

ITEM 005 - SEQUENCE NUMBER

DESCRIPTION: This item indicates the order in which PAR's are to be processed when more than one PAR is submitted for an employee simultaneously.

REQUIRED: When submitting a PAR transaction package.

ENTER: On each PAR enter the page number of the particular PAR and the total number of PAR's in the package.

All transaction packages must be sequentially numbered in effective date order with the earliest effective date first.

EXAMPLE:

005 SEQUENCE NUMBER	1	OF	3
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ITEM 010 - DOCUMENT PROCESSING NUMBER (DPN)

DESCRIPTION: Identifies the number of personnel actions processed for an employee.

A separate set of Document Processing Numbers will be assigned to each position held by an employee.

REQUIRED: On Padded PARs.

- ENTER:
- For an employee new to the data base OR additional position new to the data base, enter four numeric zeros (0000).
 - For PARs in a current transaction package, enter one number higher than DPN shown on preceding transaction.
 - For Padded PARs in an Out-of-Sequence package enter 9999.

ADDITIONAL
INFORMATION:

Each time a turnaround PAR is issued, a new Document Processing Number will print.

Only the document with the latest Document Processing Number will be accepted by Personnel Operations.

EXAMPLE:

(Padded PAR)

010	DOCUMENT PROCESSING NUMBER	0000
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(PAR 1 of 2 shows DPN 0004)

005	SEQUENCE NUMBER	2 OF 2
010	DOCUMENT PROCESSING NUMBER	0005

(Padded PARs in Out-of-Sequence package)

010	DOCUMENT PROCESSING NUMBER	9999
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2.22 (Rev. 11/91)

ITEM 015 - ROUTE TO DEPARTMENT OF

DESCRIPTION: COMPUTER GENERATED ONLY

Name of the organizational unit to which the PAR will be sent by Personnel Operations. This information will be based on employee's current position number unless otherwise specified by agency requesting duplicate PAR.

2.23 (Revised 11/09)

ITEM 105 - SOCIAL SECURITY NUMBER

DESCRIPTION:

The number assigned to the employee by the Social Security Administration; or the number assigned to the employee by PPSD until a number is obtained from the Social Security Administration. The Social Security Number is the employee's official identifier and record locator on the data base.

REQUIRED:

1. On every Form 680-A (Padded PAR); or
2. 105 Miscellaneous Change Transaction.

ENTER:

Employee's Social Security Number; or

If the employee does not have a Social Security Number, enter 'SS5'. (Personnel Operations will assign a temporary number. When the Social Security Number is obtained, report it, even if the employee has separated, using Miscellaneous Change Transaction 105.)

ADDITIONAL INFORMATION:

- Numbers beginning with 8 or 9 will not be accepted by the system.
- Miscellaneous Change Transaction 105 is keyed by PPSD Only.
- A copy of the **signed** Social Security card must be attached to the 105 PAR Transaction.
- The effective date on the 105 PAR Transaction must be the current date.
- To change a Social Security number or delete an erroneous Social Security number when employee has more than one on the data base, refer to PAM page 10.9.

EXAMPLE:

TO:	SOCIAL SECURITY # 123-45-6789
	105

ITEMS 110, 111 - EMPLOYEE'S LAST NAME, FIRST NAME AND MIDDLE INITIAL**DESCRIPTION:**

Identifies employee's name; must agree with the name as it appears on the Social Security Account Number Card and with Employee Action Request (EAR Form STD 686).

REQUIRED: ITEM 110 - LAST NAME

On every Padded PAR (Form 680-A)

ITEM 111 - FIRST NAME AND MIDDLE INITIAL

On Padded PAR when employee or additional position is new to the data base.

ENTER: In Item 110 -

Enter the employee's legal surname and suffix* or title* **as it appears on the Social Security Account Number card**. Begin entering last name at the beginning of EMPLOYEE LAST NAME field. If applicable:

- Leave one blank space between multiple last names(s) that are not hyphenated.
- Do not use any punctuation except an apostrophe (') or hyphen (-).
- Enter two spaces before a single suffix or title. If using multiple suffixes or titles, leave one space before the first suffix or title **and** two spaces before the second suffix or title.
- Enter single name employees (employees with only one name) in the EMPLOYEE LAST NAME field, tab over to the FIRST NAME AND MIDDLE INITIAL field and hit the space bar twice.
- Do not enter more than 21 characters (including spaces) for last name.

* Allowable Suffixes and Titles

Valid Suffixes:

• CPA	Certified Public Accountant
• DDS	Dentist
• EDD	Doctor of Education
• ESQ	Lawyer
• MD	Medical Doctor
• MBA	Master of Business Administration
• PHD	Doctor of Philosophy
• RN	Registered Nurse

2.24.1 (Rev. 11/08)

ITEMS 110, 111 - EMPLOYEE'S LAST NAME, FIRST NAME AND MIDDLE INITIAL
(continued)

Valid Titles:

• I	First
• II	Second
• III	Third
• IV	Fourth
• V	Fifth
• VI	Sixth
• VII	Seventh
• JR	Junior
• SR	Senior

In Item 111 -

Enter employee's legal first name and middle initial **as it appears on the Social Security Account Number card**. Begin entering first name at the beginning of FIRST NAME AND MIDDLE INITIAL field. Leave one space between the first name and the middle initial. If applicable:

- Do not use nicknames or names which are abbreviated.
- Leave one blank space between multiple names or multiple initials. If employee has no first name, enter two spaces.
- Do not use any punctuation except a hyphen (-) between hyphenated first names.
- Do not enter suffixes or titles in the FIRST NAME field.
- Do not enter more than 16 characters (including spaces) for first name and middle initial.

**ADDITIONAL
INFORMATION:**

*The employee's name must be entered on EAR and PAR documents exactly as it appears on employee's social security card and as explained in Social Security Administration publication #20-005.

WHEN ADDING ADDITIONAL FEDERAL OR STATE WITHHOLDING AND THE LAST NAME CONTAINS AN APOSTROPHE (') AND/OR HYPHEN (-) THE DOCUMENTATION MUST BE SUBMITTED TO SCO FOR KEYING. DUE TO PAYROLL SYSTEM LIMITATIONS, PAYROLL MUST PROCESS THE ADDITIONAL TAX UPDATES MANUALLY TO PREVENT THE DEDUCTION FROM REJECTING.

2.24.2 (NEW 11/08)

ITEMS 110, 111 - EMPLOYEE'S LAST NAME, FIRST NAME AND MIDDLE INITIAL
(cont.)

NOTE:

The following common name prefixes do not require a hyphen to link them to a name:
BON DA DE DEL DELA DER DI DO DU EL LA LAS LE LF LI LO LOS MAC MC MT
MTE SAN STA ST STE VAN VANDE VANDER VER VON VONDER

EXAMPLE:	EMPLOYEE LAST NAME	FIRST NAME AND MIDDLE INITIAL	EMPLOYEE LAST NAME	FIRST NAME AND MIDDLE INITIAL
	MOON		SMITH-GANN	JOHN W

NAME CHANGE OR CORRECTION must be made by using Employee Action Request (EAR Form STD 686), refer to PAM Section 6.

ITEM 120 - AGENCY

DESCRIPTION: Identifies the department and fund from which salaries are payable.

REQUIRED: When employee is first appointed, upon movement between Appointing Powers or when Agency Code is changing.

ENTER: The Agency Code of the position being filled. Agency Codes are listed in the Payroll Procedures Manual, Section B 100.

EXAMPLE:

POSITION NUMBER			
AGENCY	UNIT	CLASS	SERIAL
711			
120	121	122	123

711 013 1128 003			
POSITION NUMBER			
AGENCY	UNIT	CLASS	SERIAL
495			
120	121	122	123

ITEM 121 - UNIT

DESCRIPTION: The code assigned by the Agency to identify the Organizational structure of the Agency. May also be used to identify the function, location, or individual attendance reporting station.

REQUIRED: When employee is first appointed, or when the Reporting Unit is changing.

LENGTH: 3 characters

ENTER: The Reporting Unit Code of the position being filled.

EXAMPLE:

POSITION NUMBER			
AGENCY	UNIT	CLASS	SERIAL
	013		
120	121	122	123

711	013	1128	003
AGENCY	UNIT	CLASS	SERIAL
	010		
120	121	122	123

ITEM 122 - CLASS

DESCRIPTION: A four digit code assigned to correspond with the class title.

REQUIRED: When employee is first appointed, or when employee is changing class.

LENGTH: 4 characters

ENTER: The Class Code as shown in the Civil Service Pay Scales or the Exempt Pay Scales.

EXAMPLE:

POSITION NUMBER			
AGENCY	UNIT	CLASS	SERIAL
		1128	
120	121	122	123

711	013	1128	003
POSITION NUMBER			
AGENCY	UNIT	CLASS	SERIAL
		1139	
120	121	122	123

ITEM 123 - SERIAL

DESCRIPTION: The code assigned by the Agency to identify each separate position.

REQUIRED: When employee is first appointed, or when serial number is changing.

LENGTH: 3 characters

ENTER: The Serial Number of the position (including blanket) being filled.

EXAMPLE:

POSITION NUMBER			
AGENCY	UNIT	CLASS	SERIAL
120	121	122	003

711	013	1128	003
AGENCY	UNIT	CLASS	SERIAL
120	121	122	021

ITEM 124 - DEPARTMENT CODE

DESCRIPTION: A three digit code assigned by Personnel Operations to agencies with more than one SPB statistical organization. This code is also used to sort PARs and other reports for routing purposes.

REQUIRED: For A01 - A35 Transactions under the following conditions:

- On a Padded PAR if the department code has been assigned.
- On a Turnaround PAR if the department code in the shaded area is no longer valid.

ENTER: The Department Code assigned; or
"000" if no code assigned and the shaded area of the PAR shows a department code.

ADDITIONAL INFORMATION: If there is no assigned code, this item should be left blank when completing a Padded PAR. Code "000" will be computer generated.

EXAMPLE:



ITEM 126 – COLLECTIVE BARGAINING IDENTIFIER (CB ID)

(Rev. 09/03)

DESCRIPTION: Identifies an employee's collective bargaining status.

VALID VALUES FOR ITEM 126 COLLECTIVE BARGAINING IDENTIFIER

CIVIL SERVICE ONLY

- RANK AND FILE
R01 - R21
- SUPERVISORY DESIGNATIONS
S01 - S21
- MANAGERIAL DESIGNATIONS
M01 - M21
- CONFIDENTIAL DESIGNATIONS
C01 - C21

EXEMPT/EXCLUDED DESIGNATIONS

- E Classes excluded from SEERA coverage
- E25 Employees whose exclusive representative is mandated by SB14 (Chapter 1273). Satellite Wagering Facility employees.
- E50 Exempt employees for which DPA has salary setting authority.
- E88 Supervisory positions within Judicial Council.
- E89 Managerial positions within Judicial Council.
- E90 Legislators and employees excluded per Proposition 112.
- E91 Judges
- E92 Constitutional Officers
- E97 Employees excluded from collective bargaining who are not designated E, M, S, C, E99, or E98 in the following departments/offices: Department of Personnel Administration, State Controller's Office, Department of Finance, California Medical Assistance Commission, Office of Planning and Research, and Governor's staff; class code 9522, 9525, and 9546 in the Department of Industrial Relations; exempt positions/classes in DPA Pay Letter 86-02; and classes listed in DPA Pay Letter 91-31.
- E98 Supervisory positions in excluded organizations or employees of the Department of Personnel Administration in the class of Labor Relations Specialist I (except Legislative Council Bureau).
- E99 Exempt and Excluded managerial

The following are part of the Mid-Management Reduction Program

- E01 - E21 M01 - M21 managers demoting to rank & file or S01 - S21 supervisors demoting to rank & file.
- E48 S01 - S21 supervisor specialist
- E58 M01 - M21 managers demoting to supervisors
- E59 M01 - M21 manager specialist
- E67 E98 excluded supervisors demoting to rank & file
- E68 E98 excluded supervisor specialist
- E77 E99 excluded managers demoting to rank & file
- E78 E99 excluded managers demoting to supervisor
- E79 E99 excluded manager specialist

PAR ITEMS LINES 1 THROUGH 7

2.29.2

ITEM 126 – COLLECTIVE BARGAINING IDENTIFIER (CB ID) Con't.

REQUIRED: 1 - For 126 Transaction; or

2 - For A01-A22, A30-A35, 120, 405, GEN or SAL Transaction
when:

- CB ID in Item 126 or Line 12 (Employment History shaded area is blank or changing; or
- employee is in a "split class" (payscale CB ID is U01-U21); or
- employee is confidential and payscale CB ID is R01-R21; or
- employee is in agency code 300* and payscale footnote is 29 and payscale CB ID is other than "E97", "E98" or "E99"; or
- employee is in specific position in agency code 051 and payscale footnote is 29 and payscale CB ID is other than "E97"; or
- employee is in agency code 297, 315, 339, 363, or 430 and payscale CB ID is other than "E97", "E98", "E99"; or
- employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and payscale CB ID is other than "E01-E21", "E48", "E58", "E59", "E67", "E68", "E77", "E78" or "E79".

DO NOT COMPLETE THIS ITEM ON ANY TRANSACTION EFFECTIVE PRIOR TO 12/02/81.

ENTER:

- 1) *EOF Must be entered when the employee's collective bargaining status is changing AND the payscale CB ID for the class is to be reflected in Item 126. (*EOF will delete the old CB ID and the computer will generate the payscale CB ID.)

EXCEPTION: When a payscale CB ID is U01-U21, a code must be entered.

- 2) The applicable code when the employee's collective bargaining status is an exception to the payscale CB ID:

C01-C21- Confidential (Use only if payscale CB ID is R01-R21 or U01-U21.)

E - Excluded from collective bargaining and payscale CB ID is 'NOT' M01-M20, E E98 or E99; or payscale CB ID is U (Non-Supervisory). (Use only if agency code is 315, 339, 363 or 430; or 300* and payscale footnote is 29 and transaction effective date is between 08/31/85 and 03/01/86.

E97 - Excluded from collective bargaining and payscale CB ID is R01-R21 (Excluded/Exempt). (Use only if agency code is 315, 339, 363, 430; or 300 and payscale footnote is 29 and transaction effective date is on or after 03/01/86; or if agency code is 297 and transaction effective date is on or after 01/01/00.)

ITEM 126 – COLLECTIVE BARGAINING IDENTIFIER (CB ID) Con't.

- E97 (Cont.) - Excluded from collective bargaining and payscale CB ID is R01-R21 (Excluded/Exempt). (Use only if agency code is 051 and employee is in specific position and transaction effective date is on or after 01/01/88.)
- E98 - Excluded from collective bargaining and payscale CB ID is S or U (Supervisory). (Use only if agency code is 315, 339, 363 or 430; or 300* and payscale footnote is 29; or if agency code is 297 and transaction effective date is on or after 01/01/00.)
- Excluded from collective bargaining and payscale CB ID is C01 (Confidential). (Use only if agency code is 363 and class is 9529 or 9535.)
- E99 - Excluded from collective bargaining and payscale CB ID is M01-M21. (Use only if agency code is 315, 339, 363 or 430; or 300* and payscale footnote is 29; or if agency code is 297 and transaction effective date is on or after 01/01/00.)
- E01-E21 - Rank and File bargaining unit and payscale CB ID is R01-R21 (Rank and File). (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).
- E48 - Excluded from collective bargaining and payscale CB ID is S01-S21 (Non-Supervisory). (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).
- E58 - Excluded from collective bargaining and payscale CB ID is M01-M21 (Supervisory). (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).
- E59 - Excluded from collective bargaining and payscale CB ID is M01-M21 (Non-Supervisory). (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).
- E67 - Excluded from collective bargaining and payscale CB ID is E98 (Rank and File). (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).
- Excluded from collective bargaining and payscale CB ID is S01-S21 or U01-U21 (Rank and File) and agency code is 315, 339, 363, 430 or 300 and payscale footnote is 29. (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).

ITEM 126 – COLLECTIVE BARGAINING IDENTIFIER (CB ID) Con't.

- E67 (Cont.) - Excluded from collective bargaining and payscale CB ID is C01 (Rank and File) and agency code is 363 and class is 9529 or 9535. (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).
- E68 - Excluded from collective bargaining and payscale CB ID is E98 (Non-Supervisory). (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).
- Excluded from collective bargaining and payscale CB ID is S01-S21 or U01-U21 (Non-Supervisory) and agency code is 315, 339, 363, 430 or 300 and payscale footnote is 29. (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).
- Excluded from collective bargaining and payscale CB ID is C01 (Non-Supervisory) and agency code is 363 and class is 9529 or 9535. (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).
- E77 - Excluded from collective bargaining and payscale CB ID is E99 (Rank and File). (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).
- Excluded from collective bargaining and payscale CB ID is M01-M21 (Rank and File) and agency code is 315, 339, 363, 430 or 300 and payscale footnote is 29. (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).
- E78 - Excluded from collective bargaining and payscale CB ID is E99 (Supervisory). (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).
- Excluded from collective bargaining and payscale CB ID is M01-M21 (Supervisory) and agency code is 315, 339, 363, 430 or 300 and payscale footnote is 29. (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).

PAR ITEMS LINES 1 THROUGH 7

2.29.5

ITEM 126 – COLLECTIVE BARGAINING IDENTIFIER (CB ID) Con't.

E79 - Excluded from collective bargaining and payscale CB ID is E99 (Non-Supervisory). (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).

Excluded from collective bargaining and payscale CB ID is M01-M21 (Non-Supervisory) and agency code is 315, 339, 363, 430 or 300 and payscale footnote is 29. (Use only if employee is in specific position included in the Mid-Management Reduction Program (DPA PML 94-20) and transaction effective date is on or after 06/01/94).

S - Supervisory (Use only if payscale CB ID is U01-U21 and transaction effective date is prior to 5/2/84.)

S01-S21- Supervisory (Use only if payscale CB ID is U01-U20 and transaction effective date is on or after 5/2/84.)

R01-R21- Rank and File/Bargaining Unit (Use only if payscale CB ID is U01-U21.)

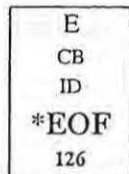
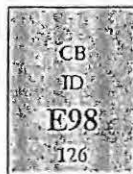
If transaction effective date is prior to 8/30/85 enter if agency code is 590 and payscale footnote is 29.

ADDITIONAL INFORMATION:

Employees collective bargaining status will also print in the CB ID column of Line 12 - Employment History.

CB ID now prints in Item 126 for ALL employees. However, prior to 08/02/82, only exception to the payscale CB ID printed in this item.

EXAMPLE:



ITEM 130 - COUNTY CODE

DESCRIPTION: Identifies the county in which the employee works.

REQUIRED:

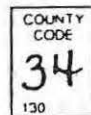
- 1 - For A01 - A03, A30, A32 - A35 Transactions when employee is new or returning to State service with no history on data base; or
- 2 - For A31 Transaction if agency code is other than 003; or
- 3 - For 130 Transaction; or
- 4 - When county code is changing.

LENGTH: 2 characters

ENTER: The appropriate code:

01	Alameda	32	Plumas
02	Alpine	33	Riverside
03	Amador	34	Sacramento
04	Butte	35	San Benito
05	Calaveras	36	San Bernardino
06	Colusa	37	San Diego
07	Contra Costa	38	San Francisco
08	Del Norte	39	San Joaquin
09	El Dorado	40	San Luis Obispo
10	Fresno	41	San Mateo
11	Glenn	42	Santa Barbara
12	Humboldt	43	Santa Clara
13	Imperial	44	Santa Cruz
14	Inyo	45	Shasta
15	Kern	46	Sierra
16	Kings	47	Siskiyou
17	Lake	48	Solano
18	Lassen	49	Sonoma
19	Los Angeles	50	Stanislaus
20	Madera	51	Sutter
21	Marin	52	Tehama
22	Mariposa	53	Trinity
23	Mendocino	54	Tulare
24	Merced	55	Tuolumne
25	Modoc	56	Ventura
26	Mono	57	Yolo
27	Monterey	58	Yuba
28	Napa	60	Out of State
29	Nevada	61	Chicago, Ill.
30	Orange	62	New York, New York
31	Placer	70	Outside U.S.A.

EXAMPLE:



0497c13

ITEM 135 - OTHER POSITION

DESCRIPTION: This item is used by departments when appointing an employee to an additional position.

REQUIRED: When first reporting an appointment to an additional position on a Padded PAR (Form 680-A).

LENGTH: 1 character

ENTER: "X"

ADDITIONAL INFORMATION: An "X" appears on the Turnaround PAR when an employee has or had more than one Civil Service, Exempt or CSU position on the Employment History Data Base.

All other positions held by an employee will be identified in Line 12, Employment History. Inactive positions will be printed with an "S" preceding the position identification.

EXAMPLE:



PAR ITEMS LINES 1 THOUGH 7

2.32

ITEM 140 – BIRTH DATE

(Rev. 09/03)

DESCRIPTION: Indicates the employee's legal birth date.

REQUIRED: 1 - For A01, A02, A03, A30, A32 - A35. Transactions when employee is new or returning to State service with no history on the data base.

LENGTH: 6 characters

ENTER: The numeric month, day and year (mm/dd/yy) of birth.

EXAMPLE:

BIRTH DATE
03/23/53
140 MM/DD/YY

PAR ITEMS LINES 1 THOUGH 7

2.33

ITEM 145 – ANNIVERSARY DATE
(Rev. 09/76)

DESCRIPTION: COMPUTER GENERATED ONLY

Information shown in this item will be the same as in Item 330 - Anniversary Date. This will give a more visible flag for the employee's anniversary date than Item 330.

ITEM 205 - TRANSACTION CODE

DESCRIPTION: The code used to identify the type of transaction being reported.

REQUIRED: FOR ALL TRANSACTIONS

ENTER: The appropriate transaction code. Transaction codes are listed on the following PAM pages:

- Appointment Transaction Codes - Pages 3.3 - 3.5
- Miscellaneous Change Transaction Codes - Pages 3.100 - 3.103
- Separation Transaction Codes - Pages 3.200 - 3.202

ADDITIONAL
INFORMATION:

Only one transaction code may be entered on each PAR.

Inactive and redefined transaction codes are listed in PAM Section 2, Line 12 - Employment History.

EXAMPLE:

(3)	(4)
TRANSACTION CODE	
(1)	(2)
205	AOI

(3)	(4)
TRANSACTION CODES	
(1)	(2)
205	SOI

(3)	(4)
TRANSACTION CODES	
(1)	(2)
205	GEN

ITEM 210 - EFFECTIVE DATE AND HOURS

DESCRIPTION: Identifies the effective date of the transaction. When the "Hours" column is blank the effective date will be:

- Appointment, Miscellaneous Change and S85 Transactions are effective "BOB"; AND
- Separation Transactions (except S85, S49, and S50 for SDI) are effective "COB".

REQUIRED: EFFECTIVE DATE is required for ALL Transactions.

HOURS is required under these conditions:

- 1) Appointment or Miscellaneous Change Transaction for NEGATIVE ATTENDANCE employee is effective other than BOB; or
- 2) S49 Transaction
- 3) S50 Transaction (for SDI)
- 4) S85 Transaction is effective other than BOB; or
- 5) Separation Transaction (except S85) for NEGATIVE ATTENDANCE employee is effective other than COB.

ENTER: EFFECTIVE DATE - (mm/dd/yy)

HOURS – If required, enter the number of hours (and tenths of hours if any) employed, BOB or COB.

NOTE: Information in shaded area of "HOURS" column will not carry forward into the next transaction. If shaded area "HOURS":

- do not apply on next transaction, do not delete them; OR
- still apply on next transaction, they must be re-entered.

* Separations following a S49 transaction and Non Industrial Disability is to be paid for the day of separation the effective date must be changed to the next day "BOB".

* The date after the 7-day waiting period for SDI benefits has been satisfied – **MUST** enter **BOB** on S50.

(continued on next page)

2.35.1 (Rev. 11/05)

ITEM 210 – EFFECTIVE DATE AND HOURS (CONTINUED)

ADDITIONAL INFORMATION:

FOR CONSECUTIVE S50 TRANSACTIONS, for State Disability Insurance (SDI) leave due to Separation Reason Code, Item 603, status changes, the effective date must be "BOB" of the date of the FMLA/CFRA status change, and not later than the Separation Expiration Date, Item 645, on the original S50 transaction placing the employee in SDI.

NOTE: Future pay period separations and salary change transactions should not be key entered until after master payroll cutoff for the pay period immediately prior to the separation pay period. Refer to Personnel Letter 01-006.

Appointment Transactions cannot be entered on the database earlier than the effective date.

Miscellaneous Change cannot be entered on the database earlier than the pay period in which effective.

EXCEPTIONS: Miscellaneous transactions MSA, SIS, GEN, SAL, and 350 can be entered prior to the effective date if following a separation that has been entered. These transactions should not be key entered until after master payroll cutoff for the pay period immediately prior to the separation pay period.

Refer to Personnel Letter 01-006

NOTE: MSA and SIS transactions can only be entered with an effective date of the first day of the pay period following a separation if the month of separation qualifies the employee for her/his MSA or SISA and the employee has been certified to receive the salary adjustment.

The following appointments can be entered on the database any time during the pay period of the effective date:

- Appointments effective after an expiring appointment; or
- Mandatory Reinstatements effective after an Adverse Suspension.

The turnaround PAR will not show a new effective date for 105, 315, 440, 445, 455 and 705 Transactions

EXAMPLE:

Appointed 10:00 (8 to 5 shift)

EFFECTIVE DATE AND HOURS		
	11/21/88	
210	MM/DD/YY	6

Separated 9:30 (8 to 5 shift)

07/1/88		
EFFECTIVE DATE AND HOURS		
	11/30/88	
210	MM/DD/YY	1.5

2.36 (Rev. 11/07)
ITEM 215 - EMPLOYMENT HISTORY REMARKS

DESCRIPTION: Used by the appointing power and Personnel Operations for informational purposes. Information entered in this item will turnaround in Line 12, Employment History.

LENGTH: A total of 16 characters and spaces are available for entry. Personnel Operations' entries have priority over the appointing power's entries. Abbreviations may be used for entries in this item.

REQUIRED:	CONDITION:	ENTER:	ADD'L INFO. ON PAGE:
All transactions	Departments are delegated the authority to backdate transactions beyond three years to their <u>date of entitlement</u> without prior review/approval by PSB. Departments must document the basis for each date of entitlement request, and retain the documentation for review. (PML 2007-026 – Effective 09/25/07) *A Court Decision is regarded as a Date of Entitlement and does <u>not</u> Require SPB/DPA approval. (Exception: Adverse Action – 5.70-5.71)	PML 2007-026	5.99, 2.203, 3.108, 9.4, 9.4.2, 9.6.1 - 9.6.2, Glossary
	Account code change over 3 years, involves money. A stamped approval on written request with a date of entitlement from Sandy May @ CalPERS OR the date the E-mail was approved from Sandy May @ CalPERS.		
A01 or A02	Limited Examination and Appointment Program Candidate identified class (class code 4687).	Class code and alternate salary range code (if any) of the parenthetical class in which the duties are performed; and if the employee is eligible for a premium pay of the parenthetical class, the CBID of the parenthetical class and established earnings identifier of the premium pay (example: 1379-B R04 8IWS).	2.43, 2.48.3.1 2.122, 7.3

2.36.1 (Revised 11/12)
ITEM 215 - EMPLOYMENT HISTORY REMARKS (Cont.)

REQUIRED:	CONDITION:	ENTER:	ADD'L INFO. ON PAGE:
A01 or A02	Class Title and Casual Employment Class	Sub-Title (Abbr. titles)	
	Emergency Appointment for short duration of work	SHORT DURATION	
	Emergency Appointment for acting assignment	ACTING ASSIGNMENT	
	Emergency Appointment for extreme emergency	EMERGENCY	
Various Transactions: Item 955	Item 955, Multiple Hourly Rate (MHR): When hourly rate is greater than \$99.99, document the rate in Remarks, Item 215, using the format referenced in the instructions for Item 955 (PAM 2.143), e.g., 955: B – 102.15		

(Continued on next page)

2.37 (Revised 12/12)
ITEM 215 - EMPLOYMENT HISTORY REMARKS (Cont.)

REQUIRED:	CONDITION:	ENTER:	ADD'L INFO. ON PAGE:
A01 or A02	Extension of Limited Term Appointment assignment.	GC 19080.4	2.202
	Retired Annuitant appointed under the provisions of Government Code Section 21228 (tenure R) to a permanent position. A02 for reinstatement or an A01 for list appointment.	GC 21228	
	For appointment transaction when employee has multiple hourly rates in excess of \$99.99. (Any MHR in excess of \$99.99 must be sent to SCO/PPSD for processing)	955: _ - _ _ _ . _ _	2.143
A03 and A02 (package)	Terminating Career Executive Assignment and applying reinstatement rights to: (A03) . former position and (A02) . a class in which employee has eligibility	RULE 548.151 RULE 548.152 or RULE 548.153E whichever is applicable	
A03	Blanketing employee into State Service.	Blanket and abbreviation of organization	3.40
	State of California to assume work previously performed by a county, city, federal department or agency, or public district.	DPALTR _ _ _ - _ _ _ CBAGR (YR - LTR #)	
	Termination of Career Executive Assignment and employee refuses position (this constitutes an active waiver).	RULE 548.153E(2)	
	Termination of Career Executive Assignment and employee is placed on a reemployment eligibility list (items 725 and 730 must be completed).	RULE 548.153F(1)	
A04	Indicating the SPB Rule authorizing the temporary assignment: <ul style="list-style-type: none"> • Interjurisdictional Exchange - SPB Rule #427 • Training Assignment - SPB #438 • Meet Compelling Management needs - SPB Rule #442 • Returning Injured Employees - SPB Rule #443 	Rule # _ _ as <u>Code</u> Class	3.46 5.50 PMPPM Section 340.14
A01-A03, A22 or A32	Effective date is Saturday, Sunday or holiday and not a shift agency.	EE WKD MM/DD/YY	
A31	Date Oath of Office taken.	OATH DT MM/DD/YY	

(continued on next page)

2.37.1 (Rev. 11/07)
ITEM 215 - EMPLOYMENT HISTORY REMARKS (Cont.)

REQUIRED:	CONDITION:	ENTER:	ADD'L INFO. ON PAGE:
215	Overpayment of separated employee. Lump sum over 99 days 999 hours	PAYMENT DUE DEPT Total vacation, annual leave and PLP time prior to converting – EXAMPLE: LSV=345D7H	5.46 2.82
	Appointment OR correction to an appointment due to information received from CalPERS.	Per CalPERS	2.203
325	Annual salary adjustment for elected official.	ANNUAL SAL ADJ	3.110
	Recruitment Premium Pay for Class 8398.	RECRUITMENT PAY or RECRUIT PAY	
340	Employee elected 10/12 plan option but is not entitled to 12 mos. Pay.	10/12 DOCK or 10/12 LATE START	2.46
.50	For newly established premium pay and the Established Earnings Identifier is NOT listed on page 2.48.1 or 2.48.2. Indicate the DPA Pay Letter establishing the premium pay.	PAY LTR #	
405	EDD employee decreasing time base as a result of participation in Voluntary Time Income Tradeoff Program.	V-TIME APPT	3.120
565C	Indicating payment of waiting period.	WAITING PER PD	5.36
565* or 215*	Reporting intervening activity.	INTERVENING ACT (SEE NOTE)	5.36
565	Indicating eligibility for Enhanced IDL - PAR Item 957 is completed with code 13-A.	ENHANCED IDL	5.36
715	A non-qualifying pay period resulting from a temporary or permanent separation for more than 11 consecutive working days which fall between two consecutive pay periods.	DOCK BETWN 2 PP	2.90
	Employee on Federally Funded WCTD (CCC employees only).	FEDERAL WCTD	5.29 & 5.33
MSA or SIS	Reporting carryover hours (<u>HOURS AND TENTHS OF HOURS</u>). (not used if employee is going to MAX).	C/O HRS _____	2.89
ISA	Permanent separation.	MSA FOR SEP EE	3.142
	Separation to deny MSA for lump sum only.	LUMP SUM ONLY	3.142
PUN	Indicating last day PUN salary is in effect.	Thru (mm/dd/yy)	5.70

* Recommended but not required.

NOTE: Intervening activity is when an employee is on and off IDL sporadically in a pay period.

2.37.1a (Revised 12/12)
ITEM 215 - EMPLOYMENT HISTORY REMARKS (Cont.)

REQUIRED:	CONDITION:	ENTER:	ADD'L INFO. ON PAGE:
S56	Employee exhausts the maximum temporary disability but not declared permanent and stationary or returned to work. Per L/C 4656 (c)(1) or (2)	TD CAP NOT P/S	
SAL	CPA or CPS certificate	DPA APPROVED CPA or DPA APPROVED CPS	5.98
SPC or S49	Employee <u>is</u> participating in the Annual Leave Program.	A/L	5.30.1 5.32
A01, A02, A03 S01 - S95 or 565	Full-time employee whose work schedule is other than 8 hrs. per day (Example: four 10-hr. days per week)	ALT WORK SCHED	
	Fractional time base employee whose work schedule is other than the daily number of hours per time base. (Example: 1/2 Time 8 hrs. per day for two weeks per month)	ALT WORK SCHED	
S50	Lessening impact of layoff and Item 603 is Code 26.	LES LAYOFF IMPAC	2.76
A20 or A21	Indicating the DPA Pay Letter approving the reallocation or split-off.	PAY LTR#	
A01 or A02	Employee excluded from the Part-time, Seasonal and Temporary (PST) Retirement Plan.	Excluded from PST	2.63.4, 2.63.5a
215	Eligible employee elects to change from IDL to IDL/S during an open enrollment period.	IDS/S 957 13-B	5.34, 5.35, 5.36
A01	Initial appointment for Career Executive assignment if: <ul style="list-style-type: none"> • employee had prior permanent civil service status • employee was employed by the legislature for 2 or more consecutive years • employee held a nonelected exempt position(s) in the executive branch for 2 or more years. 	SB 1472	
MHR	For appointment transaction when employee has multiple hourly rates in excess of \$99.99. (any MHR in excess of \$99.99 must be sent to SCO/PPSD for processing)	955: _ - _ _ _ . _ _	2.143

2.37.1b(Rev. 08/95)
ITEM 215 - EMPLOYMENT HISTORY REMARKS (Cont.)

PERSONNEL OPERATIONS ENTRIES	
CONDITION:	ENTER:
When prior State service is under a different name for employee new to the data base.	AKA Previous Last Name
For employees being appointed to a class with a Fire Mission Rate. Item 215 will always computer generate "Fire Mission Rate". Any other entry made by the appointing power will be stored on the data base and is available upon request.	FIRE MISSION RAT
For certain mass updates (i.e., "Converted mm/dd/yy).	MASS UPDATE OR CONV MM/DD/YY
When processing transactions related to illegal appointment.	ILL APPT GC 19257

EXAMPLE:

EMPLOYMENT HISTORY REMARKS C/O 125 HRS
215

ITEM 305 - ACTUAL RATE

DESCRIPTION: COMPUTER GENERATED ONLY

This salary represents the actual monthly, fraction of monthly, daily, hourly, yearly, or unit base rate of pay. It also reflects fire mission pay, if applicable.

ITEM 306 - TOTAL SALARY

DESCRIPTION: COMPUTER GENERATED ONLY

This is the total of actual rate, plus salary, monthly shift differential, special plus and special pay. Total salary is the same as Gross Salary Rate or Off Standard Salary Rate as shown on the Payroll Warrant Register, Form CD-38.

2.40 (Rev. 07/83)

ITEM 310 - SALARY PER

DESCRIPTION: Identifies employee's salary rate as monthly, daily, hourly, yearly or other.

REQUIRED: When employee is first appointed, or when Salary Per rate is changing.

LENGTH: 1 character

ENTER: The appropriate code:

- M - Month
- D - Day (or visit or meeting when paid by the day)
- H - Hour
- Y - Year
- U - Unit (for other than fraction of a cent)
- O - Other (use this code for piece work salary in fraction of a cent or if Item 320 - Based on Salary, shows "MAINT" or zero.)

EXAMPLE:

SALARY PER H 310

H SALARY PER M 310

2.41 (Revised 11/09)

ITEM 315 - PAY FREQUENCY

DESCRIPTION: Identifies the payroll pay period.

REQUIRED: When employee is first appointed, or when the Pay Frequency is changing.

LENGTH: 1 character

ENTER: The appropriate code:

- M - Monthly
- S - Semi-Monthly *
- Y - Yearly
- B - Bi-Weekly
- O - Other (includes employees whose salary is zero or MAINT.)

EXCEPTION: When appointing Retired Annuitant, Emergency, LT or TAU by Immediate Pay Appointment, complete this item with "M" regardless of the normal pay frequency of the position; except if no salary, enter "0".

EXAMPLE:

PAY FREQ
S
315

S
PAY FREQ
M
315

ITEM 320 - BASED ON SALARY

DESCRIPTION: Identifies the rate on which the employee's salary is based.

REQUIRED: When reporting a new rate on:

1. Appointments
2. MSA and SIS transactions for Governor's Office or General Services trade rate employees only. **BASED ON SALARY WILL BE COMPUTER GENERATED FOR ALL OTHER EMPLOYEES.**
3. 335, MHR, GEN, PUN or SAL transactions.

ENTER: The salary rate established for the class as shown in the Civil Service Payscales, Exempt Payscales or Trade Rate. (Do not consider time base.)

EXCEPTIONS:

- 1 - Enter the actual hourly or per visit rate for the following classes:
 - 7565 - Physician and Surgeon II - Intermittent
 - 8981 - Institution Firefighter - Part Time
 - 9917 - Catholic Chaplain - Intermittent
 - 9920 - Jewish Chaplain - Intermittent
 - 9923 - Protestant Chaplain - Intermittent
- 2 - For Exempt Appointment when the yearly salary rate is paid monthly, enter a monthly rate.
- 3 - For class 9476 - Foster Grandparent, enter four zeroes (0000). (Payment issued through the claims process.)

ITEM 320 - BASED ON SALARY

ADDITIONAL

INFORMATION: If salary is full dollar amount do not show decimal or zeros for cents. Leading zeros are not required.

Examples:		Enter:
Monthly Rate	\$565.00	565
Hourly Rate	2.50	2.50
Unit or other (cents)	.25	.25
Unit or other (fraction)	2-1/4	.0225
Variable pay schedule		0000
No Salary/No Maintenance		0000

The Based on Salary will be included in the total salary shown in Item 306 on the Turnaround PAR.

The area to the right of the vertical dashed line is for entry of the GSI (General Salary Increase) Alpha Code "O". The code must only be used when instructed by Personnel/Payroll Services Division.

EXAMPLE:

BASED ON SALARY	
1326	0

1326.00		0
BASED ON SALARY		
320	1392	

ITEM 325 - PLUS SALARY / EXPIRATION DATE OF PLUS SALARY

DESCRIPTION: Identifies an authorized additional rate of pay granted to the employee.

REQUIRED: For the following transactions when employee is first appointed; or when shaded area is blank, changing, or no longer applies:

- 1 - A01-A03, A10-A22 Transactions when hiring above minimum rate of pay; or
- 2 - A01-A03, A10-A22 Transactions when granting "Red Circle Rates"; or
- 3 - Annual salary adjustment for elected officials (325 Transaction); or
- 4 - GEN Transaction as provided by DPA Salary Resolution; or
- 5 - Miscellaneous Change Transactions 335, PUN and SAL; or
- 6 - A01 or A02 transaction for a Limited Examination and Appointment Program (LEAP) appointment (class code 4687) when granting a premium pay based on the parenthetical class in which the duties are performed. Refer to pages 2.36 and 2.122 for additional documentation instructions.

ENTER: In "Plus Salary" box:

Only the monthly amount of the authorized additional rate of pay.

For the one time adjustment of the annual salary for elected officials. The amount (Annual Salary Rate) minus (Monthly Salary Rate x 12) should total less than 11 cents. This '325' transaction is initiated by Personnel Operations.

For LEAP employees, enter the monthly amount of the authorized premium pay.

ØEOF - deleting plus salary.

(continued on next page)

ITEM 325 - PLUS SALARY / EXPIRATION DATE OF PLUS SALARY

In "Expiration Date" box:

Date (mm/dd/yy) of expiration; or

INDEF if there is no expiration date; or

*EOF - deleting expiration date.

**ADDITIONAL
INFORMATION:**

The plus salary will be included in the total salary shown in Item 306 on the Turnaround PAR.

EXAMPLE:

NOTE:

The entire item must be completed whenever an entry is made.

PLUS SALARY	EXPIRATION DATE OF PLUS SALARY
27	INDEF
325	

27.00	INDEF
PLUS SALARY	EXPIRATION DATE OF PLUS SALARY
36	INDEF
325	MM/DD/YY

36.00	INDEF
PLUS SALARY	EXPIRATION DATE OF PLUS SALARY
EOF	*EOF
325	MM/DD/YY

ITEM 330 - ANNIVERSARY DATE

DESCRIPTION: Indicates:

- 1 - The pay period when an employee will be eligible for a Merit Salary Adjustment (MSA) or Special Ingrade Salary Adjustment (SISA); or
- 2 - No salary adjustment can be determined or due.

REQUIRED: When reporting a new anniversary date on:

- Appointments
- MSA and SIS Transactions for Governor's Office employees only. (Anniversary Date will automatically be computer generated for all others.)
- Other Miscellaneous Change Transactions.

ENTER: One of the following:

- MM/YY - For month and year of anniversary date (e.g. 06/86).
- MAX - When Based on Salary for the action being reported is maximum for the class; or
- When CEA employee's salary equals or exceeds that of CEA supervisor on same level. DPA written approval must be obtained.
- NONE - When anniversary date is not determinable or if there is no anniversary date.

ADDITIONAL INFORMATION:

When establishment of anniversary date is discretionary with the department for a TAU in lieu of permanent appointment, substantiation for entry of "NONE" must be on file with the appointing power.

EXAMPLE:



ITEM 335 - ALTERNATE RANGE

DESCRIPTION: An alphabetic or numeric code denoting the salary range when a class has more than one range.

REQUIRED: 1 - For appointment to a class that has more than one range when employee is new to data base or shaded area is blank or changing; or

2 - When reporting an alternate range change.

ENTER: The letter or number for the range as shown in the Civil Service Pay Scales (including Range A).

ADDITIONAL INFORMATION: The computer will automatically delete the range if employee moves to a class with no ranges.

EXCEPTION: Range Z must be deleted manually by entering an asterisk (*).

A Separate 335 transaction may be required with an effective date the same as an existing transaction in Line 12, when specified in the alternate range criteria.

EXAMPLE:



ITEM 340 - PAYROLL STATUS *

DESCRIPTION: This item denotes the reason an employee is off the payroll. Currently, the only valid reason to use Transaction Code 340 is when the 10 month employee did not elect 10/12 pay plan option or the 10/12 employee is not entitled to a full 12 months of payment due to numerous docks or a late start. Time off payroll under Miscellaneous Transaction 340 is qualifying for State service benefits.

REQUIRED: On 340 Transactions when:

- employee did not elect 10/12 pay plan option.

OR

- employee did elect 10/12 pay plan option but is not entitled to 12 full months of payment due to numerous docks or a late start.

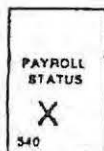
LENGTH: 1 character

ENTER: "X" - For 10/12 leave per SPB Rule 369.

ADDITIONAL INFORMATION: Entries in the shaded area of this item will be deleted by the computer when processing a 341, 565 or Separation Transaction.

- * This item was originally titled "FLSA". The title on the PAR was changed to reflect "Payroll Status" with the 10/76 revision.

EXAMPLE:



2.47 (Revised 05/11)

ITEM 345 - SHIFT DIFFERENTIAL

DESCRIPTION: A code which indicates the employee is to receive a differential rate for evening or night shift work.

- REQUIRED:**
- 1 - For employees assigned to evening or night shift for one full pay period or more. (If shift assignment is less than one full pay period, refer to Payroll Procedures Manual, Section D 300)
 - 2 - For transactions in which a change to CBID also results in a change to shift rate.
 - 3 - When shift differential code in shaded area is changing or no longer applies.

ENTER: For transactions effective on and after 08/01/89.

If employee's shift is:	Enter Code:
Evening	E *1 G R04 (Class 1120 only, eff. 11/2/10) R S14 (Class 7222 only)
Night	N H R04 (Class 1120 only, eff. 11/2/10) S S14 (Class 7222 only)
to be deleted	*

For transactions effective on 07/01/82 through 07/31/89, the following codes apply:

If employee's shift is:	And Employee's CBID is:	Enter Code:
Evening	R09	E
	R01, R03, R04, R10-R15, R17, R19 & R20	G
	R18 or S14 & class code 7222	R *2
	C, E, M or S (except C06, M06 or S06)	K *3
Night	R09	N
	R01, R03, R04, R10-R15, R17, R19 or R20	H
	R06, R07, R18 or S14 & class code 7222	S
	C, E, M or S	L
to be deleted	one of the above	*

(continued on next page)

ITEM 345 - SHIFT DIFFERENTIAL (CONTINUED)

ENTER:
(Cont.)

Employee is not eligible for shift differential if CBID is R02, R05, R08, or R16.

- *1 BU15 not eligible for shift code E after 12/31/89.
- *2 Evening shift differential code 'R' is used on transactions effective 07/01/82 through 11/30/85 for CBID's R06 and R07.
- *3 Evening shift code 'K' is used on transactions effective 07/01/82 through 11/30/85 for CBID's C06, S06, and M06.

All collective bargaining designations for transactions effective PRIOR to 07/01/82 the following codes apply:

If employee's shift is:	Enter Code:
Evening	E
Night	N
to be deleted	*

ADDITIONAL

INFORMATION: The differential rate will be computer generated and included in Item 306 - Total Salary, on the Turnaround PAR.

This item **MUST NOT** be completed on 126, 335, 345 and SAL transactions **UNLESS** the transaction is effective the first day of the pay period.

ITEM 345 - SHIFT DIFFERENTIAL (CONTINUED)

This item MAY be completed on other appropriate Appointment or 120, 405, or GEN transactions regardless of the effective date.

10/12 pay plan employees are not eligible for shift differential pay for the two non-working months each year. PARs must be documented to reflect ineligibility of differential pay for those two months.

EXAMPLE:



ITEM 350 - SPECIAL PAY

DESCRIPTION: Denotes if the employee is on or off fire mission status or if the employee receives various range salary.

REQUIRED: For employees who are on fire mission status or receive various range salary;

When special pay code shown in shaded area no longer applies.

ENTER: The applicable codes are:

F - On Fire Mission Status

N - On Non-Fire Mission Status

V - Various Range Salary or

** Brand Inspector - Intermittent (0304)

Physician & Surgeon II - Intermittent (7565)

Retired Annuitant - (no provision in pay scales for special rates approved by Board of Control - copy of Board of Control letter must be attached to the PAR)

* - Deleting Special Pay Code

** - Although this class was abolished in 1986, this information might be needed for out-of-sequence processing.

EXAMPLE:

SPECIAL PAY
F
350

F
SPECIAL PAY
*
350

2.48.1 (Rev. 08/05)

ITEM 351 - ESTABLISHED EARNINGS

DESCRIPTION: Denotes if the employee is to receive premium pay based on
1) duties being performed; 2) worksite location; 3) job related
certifications; or 4) physical fitness performance. Up to three
(3) premium pays can be maintained in Item 351 for an
employee.

REQUIRED: For employees who are eligible for premium pay(s); or when
Earnings ID shown in shaded area no longer applies.

ENTER: The applicable codes are:

ESTABLISHED EARNINGS INDICATOR

In "IND" box enter:

- L - Adding or changing Established Earnings ID
- * - Deleting Established Earnings ID

ESTABLISHED EARNINGS IDENTIFIER

In "ID" box enter (up to 4 characters)

EOF - Deleting Established Earnings ID

Refer to the Department of Personnel Administration (DPA civil
Service Pay scale for Established Earnings ID's: www.dpa.ca.gov

1. P. I. E. System LOGON
2. Documents and Information
3. Pay differentials – by Number
by Bargaining Unit

**ADDITIONAL
INFORMATION:**

1. Three premium pays are allowed in Item 351. If an employee
is eligible to receive more than three premium pays, it is
recommended that the premium pays representing the
greater compensation be maintained on Employment History.
All other premium pays must be processed by payroll
document.
2. 10/12 pay plan employees are not eligible for bilingual pay for
the two non-working months each year. PAR documentation
must be processed to reflect ineligibility of bilingual pay for
those two months.
3. Do not tab or space between indicator (IND) and ID:
Key as one (e.g. – L8B or *EOF).
4. The amount for all premium pays will be computer generated
and included in the Total Salary shown in Item 306 on the
Turnaround PAR.

2.48.2 (Rev. 08/05)

ITEM 351 - ESTABLISHED EARNINGS

ADDITIONAL
INFORMATION:
(Cont.)

5. The Established Earnings Indicator, Identifier and Amount will turnaround in the shaded area of line 9 on the PAR.
6. When established Earning ID Code 8B, 8B2, 8B3, 8H2 OR 8X1 (Unit 05 only) is entered, the approved Form 300-897 must be on file with the appointing power for DPA audit purposes. See Line 10-Completing Charts. (2.201).
7. If an employee in the Limited Examination and Appointment Program Candidate classification (class code 4687) is eligible to receive a premium pay based on the parenthetical class in which the duties are performed, document the premium pay as a plus salary rate. Refer to pages 2.36, 2.43 and 2.122 for documentation instructions.

EXAMPLES: Adding Executive Assistant Pay and Bilingual Pay

ESTABLISHED EARNINGS						ESTABLISHED EARNINGS			
IND	ID	IND	ID	IND	ID	IND	ID	IND	ID
L	8X2	L	8B						
351						352			

Deleting bilingual Pay

ESTABLISHED EARNINGS						ESTABLISHED EARNINGS			
IND	ID	IND	ID	IND	ID	IND	ID	IND	ID
L	8X2	L	8B						
		*	EOF						
351						352			

Display "locked-in" Executive Assist. Pay and amount

ESTABLISHED EARNINGS			ESTABLISHED EARNINGS		
IND	ID	AMOUNT	IND	ID	AMOUNT
L	8X2	180.00			
351			352		

2.48.3 (Rev. 11/90)

ITEM 352 - ESTABLISHED EARNINGS

This item is not to be used at this time.

2.49 (Rev. 02/86)

ITEM 355 - WWG

DESCRIPTION: The work week group assigned to the class.

REQUIRED: At the discretion of the department, however, entry must be valid for the class. If a valid WWG for the class is not entered, the item must be left blank or deleted if it no longer applies.

ENTER: The valid code shown in the civil service payscales; or "NONE" if no work week group is assigned; or *EOF to delete the invalid code for the class.

EXAMPLE:

WWG
1
355

4D10 WWG
*EOF
355

ITEM 356/357 - HIRING FREEZE STATUS CODE / FINANCE APPROVAL DATE

NOTE: Item 356/357 will continue to be reflected as Pay Letter #/Expiration Date on the Padded/turnaround PARs and the line screens.

DESCRIPTION: Indicates the hiring freeze status code and Department of Finance approval date per the state-wide hiring freeze effective October 23, 2001

Reference: Executive Order D-48-01
Management Memo 01-21
Department of Finance Budget Letter 01-43

REQUIRED: For A01, A02, A04, A09 and 405 transactions with an effective date of 10/23/01 or later. Note: Entry is always required for the above transactions even if the information shown on the update screen is not changing.

ENTER: In Hiring Freeze Status Code box:

NO-HF	If not subject to the hiring freeze pursuant to Management Memo 01-21; or
NO-EX	if excluded from the hiring freeze pursuant to Management Memo 01-21; or
XA-PP	subject to the hiring freeze pursuant to Management Memo 01-21 with Department of Finance approval of a hiring freeze exemption; or
*EOF	to delete hiring freeze status code.

In Finance Approval Date box:

Only required when XA-PP is entered in the hiring freeze status code.

Date (mm/dd/yy)	Department of Finance approved the hiring freeze exemption; or
--------------------	--

*EOF to delete Department of Finance approval date.

ITEM 356/357 - HIRING FREEZE STATUS CODE / FINANCE APPROVAL DATE
(cont.)

EXAMPLE: **NOTE:** Entry must be made for the above transactions regardless of information showing on the update screen.

PAY LETTER #	PAY LETTER EXPIRATION DATE
NO-EX	
356	MM/DD/YY

XA-PP	12/15/01
PAY LETTER #	PAY LETTER EXPIRATION DATE
XA-PP	02/01/02
356	MM/DD/YY

XA-PP	10/29/01
PAY LETTER #	PAY LETTER EXPIRATION DATE
NO-HF	*EOF
356	MM/DD/YY

NOTE: Prior to 10/23/01 Item 356/357 was used to document reallocation of workweek group. This process was discontinued effective 08/31/00 when all work groups were redefined.

ITEM 405 - TIME BASE

DESCRIPTION: Identifies time base by code or part-time fraction.

REQUIRED: When employee is first appointed, or when Time Base is changing.

ENTER: The appropriate code:

FT	-	Full-Time
INT	-	Intermittent
*IND	-	Indeterminate
**XXX/XXX	-	Part-Time Fraction (e.g. 1/2, 32/75)

ADDITIONAL INFORMATION: When submitting Miscellaneous Change Transaction 405 or if time base is changing due to a new appointment, consider the following:

Non-Member in PERS

Does this time base change qualify the employee for membership in PERS?

If employee is now eligible for PERS under the new time base, enter the appropriate code in Item 505 - Account Code.

EXAMPLE:

TIME BASE
1/2
405

001/002
TIME BASE
FT
405

* Applicable only for Exempt employees or Civil Service employees in the Brand Inspector classification (class code 0303).

ITEM 410 - APPOINTMENT TENURE

DESCRIPTION: Identifies the tenure of the appointment under which the employee is serving.

REQUIRED: When employee is first appointed; or when tenure is changing.

ENTER: The appropriate code:

P - Permanent, including training assignment and permanent exempt.

L - Limited term or specific period appointment (excluding TAU and exempt).

T - TAU or temporary exempt (including TAU in lieu of permanent or TAU in lieu of limited term).

C - Career Executive Assignment

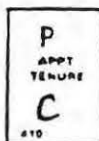
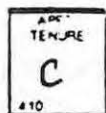
E - Emergency

R - PERS or STRS Annuitant (employment after retirement without loss of retirement status). This code is used for Retired Annuitants when employee meets conditions of tenure R in addition to another tenure.

ADDITIONAL
INFORMATION:

When completing this item with "P" and the employee is appointed to a managerial position (employee's CBID is "M" or "M01-M20"), refer to Item 415 - Number of Months, for completion of managerial tenure.

EXAMPLE:



ITEM 415 - NUMBER OF MONTHS

DESCRIPTION: This item indicates:

- Number of months of appointment; or
- Time worked is counted on an "Actual Time Worked" basis; or
- Managerial Tenure.

REQUIRED: 1) For Civil Service appointments with an expiration date or with time worked being counted on an "Actual Time Worked" basis.

EXCEPTIONS: Not required for Retired Annuitant Appointments.
Not required for Emergency Appointments unless time is to be counted on an "Actual Time Worked" basis.

- 2) When employee is permanently appointed to a managerial position (employee CBID is "M" or "M01-M20") or when managerial tenure is changing.
- 3) For exempt appointments when required by the salary setting body.
- 4) When shaded area information no longer applies and the item is allowable.

ENTER: One of the following codes:

- P - TAU in lieu of Permanent.
- T - Temporary and time to be counted on an "Actual Time Worked" basis.
- 01-24 - The number of months of appointment.
- PT - TAU in lieu of Permanent with time to be counted on an Actual Time Worked basis.
- NM - Non-restricted managerial tenure (appointment subject to the provisions of G.C. Sections 19570-19588 relating to disciplinary action)
- RM - Restricted managerial tenure (appointment subject to the provisions of G.C. Sections 19590-19593 relating to disciplinary action)
- *EOF - deleting number of months code.

2.53.1 (Revised 05/10)

ITEM 415 - NUMBER OF MONTHS (CONT.)

**ADDITIONAL
INFORMATION:**

Per SPB – Effective June 16, 2007 – 12 Month Maximum on Limited Term (LT) Certification Lists. Departments are delegated the responsibility to make 12 month LT appointments and extend them to 24 months when the statutory requirements have been met. These extensions do not require an additional appointment or recertification. Department should correct the original appointment to extend the LT appointment.

Codes NM and RM do not apply to A04 Transactions.

Report on A02 Transaction to extend an expiration date for an employee on Actual Time Worked.

Delete the Item 415 code on an A13 (Reorganization), A20 (Reallocation) or A21 (Split-off) transaction for an employee on a Training Assignment under G.C. Section 19050.8 (A04 transaction). If returning the employee to the training assignment after A13, A20 or A21 transaction, re-enter the Item 415 code on the A04 transaction.

EXAMPLE:

# MOS. 06 415	06 #MOS. T 415	#MOS. RM 415	T #MOS. *EOF 415
------------------------------------	---	-----------------------------------	---

ITEM 416 - APPOINTMENT EXPIRATION

DESCRIPTION: Denotes the expiration date of an appointment.

REQUIRED:

1. For Appointment having an expiration date.
2. For Emergency Appointment.
3. For Immediate Pay Appointment.
4. For 405 Transaction when expiration date is changing.
5. When shaded area information no longer applies and the item is allowable.

ENTER: In "**DATE**" Box:

(mm/dd/yy) of:

- Expiration of Appointment; or
- Expiration date of Emergency Appointment; or
- Last day on pay status for Immediate Pay Appointment

Example: 09-month TAU Appointment:

[Appointment Date – 02/08/99]

[Expiration Date – 11/07/99]

*EOF – delete date

"HOURS" must be completed when the expiration date is part of a day. This is only required when the original appointment effective date is part of a day AND the appointment is for the maximum length allowable. In addition, "Hours" must be deleted when no longer valid.

In "**HOURS**" box:

When required, enter the hour derived by deducting number of hours in Item 210 from the number of hours in employee's shift.

Example: 9 months TAU Appointment – 8-hour shift

Appointment effective date 02/09/99 – 3 hours (Item 210)

Expiration effective 11/08/99 – 5 hours (Item 416)

0EOF - delete hours

(continued on next page)

ITEM 416 - APPOINTMENT EXPIRATION (CONTINUED)

ADDITIONAL

INFORMATION: Report an A02 Transaction to extend an expiration date for an employee on Actual Time Worked.

Delete Item 416 date and hour values on an A13 (Reorganization), A20 (Reallocation) or A21 (Split-off) transaction for an employee on a Training Assignment under G.C. Section 19050.8 (A04 transaction). If returning the employee to the training assignment after A13, A20 or A21 transaction, re-enter the Item 416 date/hours on the A04 transaction.

EXAMPLE:

APPOINTMENT EXPIRATION	
DATE	HOURS
03/02/82	1.0
416	

03/02/82	1.0
APPOINTMENT EXPIRATION	
DATE	HOURS
*EOF	EOF
416	MM/DD/YY

ITEM 425 - CERTIFICATION NUMBER

DESCRIPTION: This item indicates:

- Number assigned to the civil service eligibility list from which employee is being appointed; or
- Entitlement information for A30, A31 or A35 Exempt Appointment.

REQUIRED: For A01, A30, A31 and A35 Transactions when:

- 1 - employee is new to data base; or
- 2 - shaded area is blank or changing; or
- 3 - shaded area information still applies AND agency code is changing. (Information must be re-entered due to system problem.)

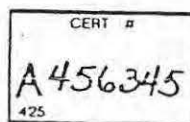
ENTER: For Civil Service Employees:

- Certification Number from eligibility list, (e.g. A456345, 10002PN, 1126SF, 4870NT, 1128, etc.). Leave out dashes between numeric and alpha characters; or

For Exempt Employees:

- The entitlement which specifically authorizes the exempt position. (Leave out periods, dashes, etc.); or
- EXCONT to indicate exempt contract for California Conservation Corps. Exempt Appointment.

EXAMPLE:



ITEM 426 - TYPE OF LIST / EXEMPT STATUS

DESCRIPTION: For Civil Service Employees, indicates type of certification list from which appointed.

For Exempt Employees, indicates whether or not employee is eligible for PERS Membership.

REQUIRED: 1 - For A01 Transaction when;
 . tenure is P, L, C, or R (list appointment);
 . information in shaded area is no longer valid.

2 - For A30, A31, A32, or A33 Transactions when
 Exempt Authority Code (Item 535) is C, D, E,
 F, or M.

ENTER: For Civil Service Employees, one of the following;

- C - CEA Roster
- 1 - Subdivisional Reemployment
- 2 - Departmental Reemployment
- 3 - General Reemployment
- 4 - Subdivisional Promotional
- 5 - Departmental Promotional
- 6 - Multi-Departmental Promotional
- 7 - Servicewide Promotional
- 8 - Preferred Limited Term
- 9 - Open
- Blank - for non-testing or TAU. (If a code is shown in the shaded area, delete as shown.)
- * - deleting type of list

(continued)

ITEM 426 - TYPE OF LIST / EXEMPT STATUS (CONT.)

ENTER:
(Cont.)

For Exempt Employees, the appropriate code as shown below:

CODES DEFINED:

M - Mandatory - must be a PERS Member if and when employee meets normal PERS eligibility requirements.

O - Optional - eligible to elect PERS Membership if and when employee meets normal PERS eligibility requirements.

N - Not Eligible for PERS Membership.

If Exempt Authority
Code (Item 535) is:

Enter:

C	<p>M or</p> <p>O - if employee was either:</p> <ul style="list-style-type: none"> · an elected official; or · appointed by an elected official. <p>N - if employee was either appointed as a Retired Annuitant under G.C. 19144 subject to G.C. 21224; or if elected to a Judgeship.</p>
D	<p>M - if employee was either:</p> <ul style="list-style-type: none"> · appointed by the Governor <u>and</u> was nominated for office; or · not appointed by the Governor. <p>O - if employee was appointed by the Governor <u>without</u> being nominated for office.</p> <p>N - if employee was appointed as a Retired Annuitant under G.C. 19144 subject to G.C. 21224.</p>

(continued on next page)

ITEM 426 - TYPE OF LIST/EXEMPT STATUS (cont.)

ENTER:
(Cont.)

If Exempt Authority Code (Item 535) is:	Enter:
E	<p>M - if employee was not appointed by the Governor.</p> <p>O - if employee was appointed by the Governor.</p> <p>N - if employee was appointed as a Retired Annuitant under G.C. 19144 subject to G.C. 21224.</p>
F	<p>M - if employee was appointed by the Governor <u>and</u> was nominated for office.</p> <p>O - if employee was either: · appointed by the Governor <u>without</u> being nominated for office; or · appointed by the Lieutenant Governor.</p> <p>N - if employee is appointed to CAL ESTEEM Project Specialist II (Class 0926); or if appointed to a Judgeship.</p>
M	<p>M - if employee was either: · appointed by the Legislative Counsel; or · appointed by the Public Utilities Commission.</p> <p>O - if employee was appointed by the Attorney General.</p> <p>N - if employee was appointed as a Retired Annuitant under G.C. 19144 subject to G.C. 21224.</p>

(continued on next page)

ITEM 426 - TYPE OF LIST / EXEMPT STATUS (CONT.)

ADDITIONAL
INFORMATION:

For all other exempt categories, this code will be computer generated (on Appointment and Miscellaneous Change Transactions) as follows:

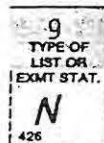
M - will print if Exempt Authority Code (Item 535) is B, G, H, I, L, or R.

O - will print if Exempt Authority Code (Item 535) is A, K, or S.

N - will print if employee is appointed by the California Conservation Corps or if Exempt Authority Code (Item 535) is J.

ANY EXCEPTIONS to the above must be approved by PERS.

EXAMPLE:



ITEM 430 - PROBATIONARY PERIOD

DESCRIPTION: Identifies an employee's probationary period status and may indicate the month, day and year the probationary period ends. Probationary code (Item 430), right of return code (Item 871) and employment history must all agree. (Refer to GC 19170-19180, Laws and Rules 321-322 and PMPPM Section 320.)

- REQUIRED:**
- 1 - For the following transactions when employee is first appointed new to the data base or when probationary period CODE is changing:
 - Appointment transactions for tenure P or R when not appointed under G.C. 19144 subject to G.C. 21224.
 - Completion of probationary period for intermittent, indeterminate, or fractional time base employee. (Use Miscellaneous Transaction 430)
 - Extension of probationary period. (Use Miscellaneous Transaction 430)
 - 2 - For Miscellaneous Transaction 405. (Only allowable codes are 3 or N.)

ENTER: Applicable code (1 digit) and date (mm/dd/yy) as indicated below:

- CODES
DEFINED:**
- 1 - Must serve new probationary period with this appointment. Completion date will be computer generated for full time employee. (The computer will delete any ending date shown in the shaded area for intermittent, indeterminate, or fractional time base employee.) EXCEPTION: Completion date **MUST** be entered for tenure R when not appointed under G.C. 19144 subject to G.C. 21224.
 - 2 - Waived probationary period. (The computer will delete any ending date shown in the shaded area.)
 - 3 - Must complete probationary period now serving. Enter completion date for full time employee. (Includes return from temporary separations). (The computer will delete any ending date shown in the shaded area for intermittent, indeterminate, or fractional time base employee.)
 - 4 - Completing a probationary period started prior to last appointment. Enter completion date for full time employee. (The computer will delete any ending date shown in the shaded area for intermittent, indeterminate, or fractional time base employee.)

(continued on next page)

ITEM 430 - PROBATIONARY PERIOD (cont.)

**CODES
DEFINED:**

- 5 - Extending a probationary period for full time employee only. (Use only with Miscellaneous Transaction 430.) Enter completion date.
- 6 - Intermittent or indeterminate or fractional time base employee completed probationary period. (Use only with Miscellaneous Transaction 430.) Enter completion date.
- 7 - Blanketed into State Service. Enter completion date for full time employee if probationary period has not been completed.
- N - Cannot require new probationary period. (The computer will delete any ending date shown in the shaded area.)
- Blank - This item is left blank for tenure T, C, L, E or R when appointed under G.C. 19144 subject to G.C. 21224 or Exempt Appointments. (See Additional Information below.)

**ADDITIONAL
INFORMATION:**

The ending date will remain blank for intermittent, indeterminate, or fractional time base employees for Codes 1, 3, 4, 7.

The computer will generate an "N" and delete any ending date for tenure T, C, L, E, and R when appointed under G.C. 19144 subject to G.C. 21224 and will delete any information in this item for Exempt Appointments.

Probationary code (Item 430), right of return code (Item 871 entry) and employment history must all agree with each other.

EXAMPLE:

PROBATIONARY PERIOD	
CODE	ENDING DATE
1	

PROBATIONARY PERIOD	
CODE	ENDING DATE
1	04/17/99
N	

PROBATIONARY PERIOD	
CODE	ENDING DATE
1	
6	06/23/99

ITEM 435 - MCR APPROVAL

DESCRIPTION: CODE: Identifies the Modified Classification Review list allocation for the class.

FORM: The type of form used for approval.

DATE: The date of approval.

REQUIRED: 1) When employee is first appointed to a Civil Service or Exempt classification; or when information in shaded area is blank, changing, or no longer applies; or mandatory reinstatement following a temporary separation.

EXCEPTION: Not required for Statutory, Judicial Council or CCC Exempt classifications, Emergency, Mandatory Reinstatement to same class for current employee, Reallocation, Training and Development Assignments, or Retired Annuitants.

2) When shaded area information still applies AND agency code is changing. (Information must be re-entered due to system problem.)

ENTER: CODE - FORM - DATE (mm/dd/yy) as indicated below:

For MCR I -

Code: 1

Form: Leave blank; or enter *EOF to delete form shown in shaded area.

Date: Leave blank; or enter *EOF to delete date shown in shaded area.

For MCR II (No change in duties) -

Code: 2

Form: NCD

Date: Leave blank; or enter *EOF to delete date shown in shaded area.

For MCR II (New, reclassified position or change in duties) -

Code: 2

Form: One of the following:

613 - Position Justification

625 - Request for Certification

LTR - DPA Letter

Date: Approval date of above form.

(continued on next page)

ITEM 435 - MCR APPROVAL (CONTINUED)

ENTER:
(Cont.)

For NO MCR -

Code: N

Form: One of the following:

613 - Position Justification

625 - Request for Certification

LTR - DPA Letter

Date: Approval date of above form.

EXAMPLE:

MCR APPROVAL		
CODE	FORM	DATE
2	625	03/10/81
435		

MCR APPROVAL		
CODE	FORM	DATE
2	613	07/15/79
435		

MCR APPROVAL		
CODE	FORM	DATE
1	*EOF	*EOF
435		

MCR APPROVAL		
CODE	FORM	DATE
2	NCD	*EOF
435		

ITEM 440 - SEX

DESCRIPTION: Indicates the gender of the employee.

- REQUIRED:
- 1 - For A01, A02, A03, or A32 - A35 Transactions when employee is new or returning to State service with no history on data base; or
 - 2 - For A30 or A31 Transactions - when employee is new or returning to State service with no history on data base and Exempt Authority Code (Item 535) is other than "C" or Exempt Authority Code (Item 535) is "F" and the employee is not appointed to a cabinet position by the Governor; or
 - 3 - For A31 Transaction if agency code is other than 003; or
 - 4 - For 440 Transaction.

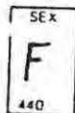
ENTER: One of the following:

M - Male
F - Female

ADDITIONAL INFORMATION: This item may be completed for the following transactions when an employee is new or returning to State service with no history on data base:

1. A31 Transaction when Exempt Authority Code (Item 535) is "C" and the employee is a Constitutional Officer.
2. A31 Transaction when Exempt Authority Code (Item 535) is "F" and the employee is appointed to a cabinet position by the Governor.
3. A30 Transaction when Exempt Authority Code (Item 535) is "C" and the employee is selected by a Constitutional Officer to one of the following positions:
 - immediate secretary
 - administrative or legislative aide
 - first line aide or legal advisor

EXAMPLE:



ITEM 445 - ETHNIC ORIGIN

DESCRIPTION: Identifies the ethnic origin of the employee. See PTM, Section 200 and SPB Rule 547.34.

- REQUIRED:**
- 1 - For A01 - A03 Transactions when employee is new or returning to State service with no history on data base; or
 - 2 - For A30 or A31 Transaction when employee is new or returning to State service with no history on data base and Exempt Authority Code (Item 535) is other than "C" or Exempt Authority Code (Item 535) is "F" and the employee is not appointed to a cabinet position by the Governor; or
 - 3 - For 445 Transaction.

ENTER: One code from the chart below.

ALPHA Code - when employee indicates his/her own race/ethnicity.

OR

NUMERIC Code - when department must designate an employee's race/ethnicity. (Use only when the employee declines self-identity.)

2.59.1 (Revised 04/13)

ITEM 445 - ETHNIC ORIGIN (CONTINUED)

ENTER: (cont.)

ETHNIC GROUP	RACE/ETHNICITY	EMPLOYEE SELF- IDENTIFICATION	DEPARTMENT IDENTIFICATION
BLACK	Black	F	1
ASIAN	Japanese	I	2
	Chinese	J	
	Korean	K	
	Vietnamese	L	
	Asian Indian	M	
	Cambodian	U	
	Laotian	V	
	Other Asian	S	
HISPANIC	Mexican, Mexican-American/Chicano	A	4
	Puerto Rican	B	
	Cuban	C	
	Any Other Spanish/Hispanic	D	
WHITE	White	E	5
PACIFIC ISLANDER	Hawaiian	P	6
	Samoan	Q	
	Guamanian/Chamorro	R	
	Other Pacific Islander	T	
AMERICAN INDIAN	American Indian	H	7
	Aleut	O	
	Eskimo	N	
FILIPINO	Filipino	G	8

ITEM 445 - ETHNIC ORIGIN (CONTINUED)

ADDITIONAL

INFORMATION: 1. This item may be completed for the following transactions when an employee is new or returning to State service with no history on data base:

- a. A31 Transaction when Exempt Authority Code (Item 535) is "C" and the employee is a Constitutional Officer.
- b. A31 Transaction when Exempt Authority Code (Item 535) is "F" and the employee is appointed to a cabinet position by the Governor.
- c. A30 Transaction when Exempt Authority Code (Item 535) is "C" and the employee is selected by a Constitutional Officer to one of the following positions:
 - immediate secretary
 - administrative or legislative aide
 - first line aide or legal advisor
- d. A33 or A35 Transactions.

EXAMPLE:

ETHNIC ORIGIN
3
445

2.60 (Revised 05/10)

ITEM 450 - PRIOR STATE SERVICE

DESCRIPTION: Indicates employee's prior State employment status as defined in DPA Regulation 599.826.

REQUIRED: For A01, A02, A03, A09, A22, or A30 - A35 Transactions when employee is new or returning to State service or is being hired in an additional position.

ENTER: The appropriate code:

- 1 - New to State service (No prior exempt or civil service employment).
- 2 - Returning after temporary separation and history IS on data base.
- 3 - Returning after permanent separation (had prior State employment as exempt, civil service, CSU, or non-rostered emergency) and history IS on data base.
- *4 - Additional position appointment new to the data base. (Code 4 will not turnaround in Item 450, but will be reflected as an "X" in Item 135 - Other Position.)
- *3/1-Anytime a correction is made to an appointment with a prior state service code in the shaded area – information must be re-entered on the corrections.
- *1/2-Returning after temporary separation and history is NOT on data base; or blanketed into State service.
- *1/3-Returning after permanent separation (had prior State employment as exempt, civil service, or non-rostered emergency) and history is NOT on data base.
- *4/1-Employee has no prior civil service or exempt employment, but is on data base in CSU position.
- 3/* - To delete when invalid/unnecessary.

ADDITIONAL INFORMATION: If prior State service was as an exempt only, or non-posted emergency, refer to Section 2, Line 10 - Completion Charts.

* Refer to Section 10, page 10.11 for Special Keying instructions.

EXAMPLE:

PRIOR STATE SERVICE	PRIOR STATE SERVICE	PRIOR STATE SERVICE
3	4/1	3/1
450	450	450

2.61 (Revised 11/11)

ITEM 455 - DISABILITY CODE

DESCRIPTION: A code indicating the employee's self-identification of disability status or that the employee did not respond to the State Employee Disability Questionnaire. (Refer to Government Code Section 19233.)

REQUIRED: 1 - For 455 Transaction. I

ENTER: The applicable code:

ALPHA CODE

A - Visual

B - Hearing

C - Speech

D - Orthopedic Impairments; amputations or functional limitations of upper or lower extremities; or trunk, back or spine when there is a medically diagnosed disability

H - Epilepsy

I - Neurological Impairments

J - Mental Retardation

K - Heart or Circulatory Conditions

L - Disease of the Blood and blood forming organs

M - Respiratory Impairment

N - Digestive Disorders

O - Colostomies and Ileostomies

P - Kidney Disease

Q - Diabetes

R - History of Cancer

S - Conditions of the Skin

ITEM 455 - DISABILITY CODE (CONTINUED)

ENTER: T - Dyslexia
(CONT.) U - Mental Disorders
 V - Alcoholism or Drug Addiction
 W - Other
 X - No disability

NUMERIC CODE

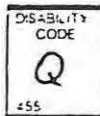
8 - Employee did not respond

ADDITIONAL
INFORMATION:

This item will not turnaround on the PAR.

Only one code is allowed in Item 455. If an employee completes a primary and a secondary code on the Disability Questionnaire, enter the primary code in Item 455.

EXAMPLE:



2.62 (Revised 11/09)

PAR ITEMS 1 THROUGH 7
ITEM 505 - ACCOUNT CODE INDEX

SUBJECT	PAGE
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➤ First-Tier Retirement	2.62.1b
➤ Second-Tier Retirement	2.62.1b – 2.62.1c
➤ Second-Tier Retirement Eligibility Chart	2.62.1d
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ITEM 505 - ACCOUNT CODE	
➤ Description	2.62.2a
➤ Determining/Entering Appropriate Retirement Code	2.62.2a
➤ CalPers Membership Eligibility/ Chart	2.62.2b
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ITEM 505 - RETIREMENT ACCOUNT CODES/DESCRIPTIONS	
➤ CalPERS Miscellaneous First -Tier Member	2.63.1a – 2.63.1e
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➤ CalPERS Miscellaneous Second -Tier Member	2.63.1f – 2.63.31h
➤ CalPERS Industrial First -Tier Member	2.63.1i – 2.63.1l
➤ CalPERS Industrial Modified First -Tier Member	2.63.1l
➤ CalPERS Industrial Second - Tier Member	2.63.1m – 2.63.1n
➤ CalPERS Safety First-Tier	2.63.1o – 2.63.1t
➤ CalPERS Safety Second-Tier	2.63.1u
➤ CalPERS POFF First -Tier	2.63.1v – 2.63.1y
➤ Appendix I	2.63.1z
➤ Appendix II	2.63.1aa
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➤ Appendix IV	2.63.1dd – 2.63.1ee
➤ Appendix V	2.63.1ff
➤ Appendix VI	2.63.1gg
➤ CalPERS CHP First -Tier	2.63.1hh
➤ JRS Retirement System	2.63.1ii
➤ LRS Retirement System	2.63.1jj
➤ STRS Retirement System	2.63.1kk
➤ PST Retirement System	2.63.1ll – 2.63.1mm
➤ ARP Retirement System	2.63.1nn – 2.63.1qq
➤ NON - Retirement Plans	2.63.1rr – 2.63.1ss
GLOSSARY	2.63.2a-2.63.2e

ITEM 505 - ACCOUNT CODE

GENERAL INFORMATION**MEDICARE**

Employees who are hired OR rehired (following a permanent separation/break in service) on or after 04/01/86 and are **not** eligible for Social Security coverage, are subject to Medicare tax per Public Law 99-272 (HR 3128). A Medicare coverage retirement account code must be used if employee is not eligible for Social Security coverage.

The following employees are subject to Medicare:

- Employees not subject to retirement due to the nature of their class or type of appointment (example: less than 1/2 time).
- Rehires who do not have Social Security/Medicare due to participation in the 1959 or 1961 OASDI elections.
- Retirement system members who are not covered under Social Security/Medicare (example: Safety and Peace Officer/Fire Fighter [POFF] employees).
- Additional positions where the employee is a non-retirement member because the primary position is full time and covered by retirement. Must have been hired in the primary position after 03/31/86.
- Statutory and other exempt employees who elect non-retirement membership.

The following employees are excluded from Medicare:

- Members who are covered by Social Security, have been continuously employed since prior to 04/01/86 and appointed to a position that does not require Social Security are excluded from Medicare.
- Employees who were actively employed on March 31, 1986. (NOTE: Employees who were hired prior to 04/01/86, separated on or after 04/01/86 and are later rehired (after 04/01/86) are subject to Medicare.)
- Employees moving from California State University (CSU) to Civil Service (CS) the next work day (no break in service), if not subject to Social Security/Medicare at CSU.

ITEM 505 - ACCOUNT CODE (cont.)

GENERAL INFORMATION (cont.)

- MEDICARE (cont.)**
- ▶ Students hired by the school, college or university they are attending except when school is not in session. When school is not in session, they are subject to Medicare.
 - ▶ Individuals performing services existent to relieve them from unemployment.
 - ▶ California Conservation Corps members (agency code "532")
 - ▶ Individuals performing temporary services necessitated by flood, fire, storm, snow, earthquake or other similar emergencies.
 - ▶ Patients or inmates of a hospital, home or other institution who are performing services therein.
 - ▶ Non-resident aliens performing services for the State - Oath/Non-Citizen status (Item 545) = A (not subject to Social Security or Medicare).

**FIRST-TIER
RETIREMENT:**

Retirement system coverage for Civil Service employees who:

1. Were hired prior to implementation of Second-Tier, have not had a break in State service prior to 04/01/86 and did not elect Second-Tier coverage.

OR

2. Have returned to State service between 04/01/86 and 12/31/99 following a permanent separation and made an election through CalPERS to return to First-Tier.

OR

3. Were hired on or after 01/01/00 and did not make an election to Second-Tier.

These employees pay into retirement and may or may not pay Social Security or Medicare.

**SECOND TIER
RETIREMENT:**

Retirement system coverage for Civil Service employees who:

1. Were hired/rehired after their bargaining unit agreed to Second-Tier* or on/after 07/01/91 which ever came first and prior to 01/01/00. This is a mandatory coverage under these conditions.

OR

* See "Second-Tier Retirement Eligibility Chart", PAM 2.62.1d, to determine effective date on which bargaining unit implemented "Second Tier" retirement coverage.

ITEM 505 - ACCOUNT CODE (cont.)

GENERAL INFORMATION (cont.)

**SECOND TIER
RETIREMENT:**
(cont.)

2. Made an election to move from First Tier to Second Tier.
OR

3. Were hired 01/01/00 or later and made an election through
CalPERS to Second Tier.

These employees **do not** pay into retirement and may or may not
pay Social Security or Medicare.

NOTE: CHP employees whose principle duties consist of active law
enforcement service and those employees in positions designated as
Safety or Peace Officer/Fire Fighter (POFF) are not subject to
Second-Tier*.

* Does not include Safety Account Codes 13 and 14 where employee elected to retain prior
retirement formula.

ITEM 505 - ACCOUNT CODE (cont.)

GENERAL INFORMATION (cont.)

SECOND TIER

RETIREMENT:

(cont.)

SECOND-TIER RETIREMENT ELIGIBILITY CHART
BY C.B. UNIT AND EFFECTIVE DATE BARGAINING UNIT AGREED TO
SECOND-TIER

M = MISCELLANEOUS				I = INDUSTRIAL			
C.B. UNIT	EFF. 01/01/85	EFF. 01/01/86	EFF. 09/01/86	EFF. 07/01/87	EFF. 09/01/88	EFF. 10/01/90	EFF. 07/01/91
01	M		I				
02		M	I				
03	M			I			
04	M			I			
05							M/I
06							M/I
07	M			I			
08							M/I
09							M/I
10	M			I			
11	M			I			
12	M			I			
13							M/I
14	M			I			
15	M			I			
16		M	I				
17	M			I			
18	M			I			
19					M/I		
20	M			I			
21						M/I	

ITEM 505 - ACCOUNT CODE (cont.)

GENERAL INFORMATION (cont.)

**MODIFIED
FIRST-TIER
RETIREMENT:**

Retirement system coverage for Civil Service employees in Bargaining Units 16 and 19 who elected to change from Second-Tier to Modified First-Tier. Modified First-Tier coverage is effective from 08/01/98 through 12/31/99 only. On 01/01/00 all employees in Modified First-Tier were automatically rolled over into the appropriate First-Tier coverage.

- ▶ **Rank and File** - Miscellaneous/Industrial employees newly hired or becoming eligible for retirement membership on or after the date their bargaining unit agreed to Second-Tier or 07/01/91 which ever is first, through 12/31/99 are mandatorily place in Second-Tier. Effective 01/01/00 all employees newly hired or becoming eligible for retirement membership will be placed in First-Tier and given the option to elect Second-Tier.
- ▶ All managerial, supervisory and confidential "Miscellaneous" employees newly hired or becoming eligible for membership between 01/01/85 and 12/31/99 are mandatorily placed in Second Tier. Effective 01/01/00 all employees newly hired or becoming eligible for retirement membership will be placed in First Tier and given the option to elect Second Tier.
- ▶ All managerial, supervisory and confidential "Industrial" employees newly hired or becoming eligible for membership between 09/01/86 and 12/31/99 are mandatorily placed in Second-Tier. Effective 01/01/00 all employees newly hired and becoming eligible for retirement membership will be placed in First-Tier and given the option to elect Second-Tier.
- ▶ Effective dates shown for Account Codes are based on employee elections and/or law changes and indicate when coverage was established. Account Codes shall not be used on transactions effective prior to dates shown. Account Code changes must be effective the first of the pay period.
- ▶ All time for which the employee is compensated, with the exception of "Holiday Pay", is counted when calculating the 1,000 hours or 125 days requirement.
- ▶ Miscellaneous members who elected Second-Tier coverage for all past or prospective service in 01/01/85 or 01/01/86 and later transfer to an Industrial position are placed in Second-Tier and have the right to elect First-Tier. The first two election periods were for State Miscellaneous employees only; State Industrial employees were not given the option of electing Second-Tier at that time. Effective 01/01/00 these employees will be placed in First-Tier and given the option to elect Second-Tier.

ITEM 505 - ACCOUNT CODE (cont.)

GENERAL INFORMATION (cont.)

- ▶ Returning employees who left funds on deposit with CalPERS when separated from last employment with the State or public agency are considered members of the retirement system regardless of tenure or time base requirements. CalPERS is responsible for determining the validity of this information and will notify Personnel Operations to correct the record.
- ▶ Effective 01/01/00, Senate Bill 400 gives all current Second-Tier members the option to elect First-Tier.
- ▶ If Account Code 45 is shown for an employee who elected survivor or non-survivor coverage, the PAR will turnaround with "YES" in the SS/Med column and "NO" in the Survivor column. When this occurs, CalPERS will send Personnel Operations a transaction to correct the retirement information.
- ▶ Employee transferring between Miscellaneous and Industrial would retain the same coverage; the exception would be someone whose position was re-classed to "safety" and elected to retain their previous Industrial status (no Social Security); and later transfers to a non-safety position.
- ▶ Refer to Payroll Procedures Manual, Section H 214, for retirement contribution deduction amounts.

ITEM 505 - ACCOUNT CODE (cont.)

DESCRIPTION: A one or two digit alpha or numeric code used by the EHDB system to designate an employee's retirement status.

REQUIRED: When the employee is:

- New to the data base or adding a position to the data base via a Padded PAR; or
- Changing from non-member to member or vice versa; or
- Changing retirement benefit formula; or
- Changing from one retirement system to another; or
- Changing from PST retirement plan to a retirement system; or
- Changing position or appointment status thereby making the Account Code reflected in Item 505 of the PAR incorrect. (e.g., employee moved from Agency "054"/Retirement Account Code "95" to Agency "280"/Retirement Account Code "41".)

ENTER: The appropriate retirement account code. To arrive at the appropriate code:

Determine the appropriate retirement system or plan to be used for your agency/employee with the following considerations. (Information is based on the California Public Employees' Retirement Law; Judges' Retirement Law; Legislators' Retirement Law; the California State Constitution; and Part-time, Seasonal and Temporary [PST] Retirement Plan guidelines. **The various retirement systems/plans and basic eligibility requirements are:**

- CalPERS - California Public Employees' Retirement System

Retirement coverage for Civil Service and DPA Exempt employees who meet CalPERS membership eligibility criteria and for Statutory Exempt employees who opt to be CalPERS members. (Statutory Exempt employees have no eligibility requirement.)

ITEM 505 - ACCOUNT CODE (cont.)

CalPERS Membership Eligibility

Determine employee's time base. If employee has more than one fractional position, total all the time bases. The retirement status of all positions not to exceed full-time must agree. See "NON" retirement chart for those positions in excess of full-time (PAM 2.63.1n).

Refer to the following chart and read across to determine the employee's eligibility based on time base, term of employment and/or service completed within the fiscal year.

CalPERS MEMBERSHIP ELIGIBILITY CHART			
IF EMPLOYEE'S TIME BASE IS:	AND TERM OF EMPLOYMENT IS:	AND SERVICE COMPLETED IS:	THEN ELIGIBILITY IS:
Intermittent, Indeterminate or Fractional Time Base (less than 1/2 time)		0-1,000 hours (or 0-125 days if compensated on a daily rate) completed within one fiscal year	NO*
		Over 1,000 hours (or over 125 days if compensated on a daily rate) completed within one fiscal year	YES**
Fractional Time Base (more than 1/2 time)	Less than 12 calendar months	0-1,000 hours (or 0-125 days if compensated on a daily rate) completed within one fiscal year	NO*
		Over 1,000 hours (or over 125 days if compensated on a daily rate) completed within one fiscal year	YES**
	12 calendar month or more	-----	YES
Full Time	Temporary for an unspecified duration	0-6 calendar months	NO*
		More than 6 calendar months	YES**
	Temporary for 6 calendar months or less	0-1,000 hours (or 0-125 days if compensated on a daily rate) completed within one fiscal year	NO*
		Over 1,000 hours (or over 125 days if compensated on a daily rate) completed within one fiscal year	YES**
	Permanent or Temporary for more than 6 calendar months	-----	YES

* See "PST" or "NON" retirement charts.

** Membership is effective no later than the first day of the pay period following completion of the required service.

ITEM 505 - ACCOUNT CODE (cont.)

Exceptions to CalPERS Membership Eligibility Chart:

1. Department of Education Student Aids in special schools are excluded from membership.
2. Department of Forestry employees in Safety Retirement Classes are eligible for CalPERS membership regardless of length of appointment (GC 20305).
3. Office of State Printing Plant (Agency Code 330) full-time employees are required to be retirement members in all additional positions.

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

MISCELLANEOUS FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
Member elected no SS/Med in 1961, has remained continuously employed since prior to 04/01/86	Misc. First-Tier	N	00 Effective 07/01/74 to 12/31/99
OR			40 Effective 01/01/00 to 08/30/01 for all CBID's
Member is a non-resident alien not subject to SS/Med (F-1, J-1 or M-1 Visa) (Item 545 = A)			Effective 08/31/01 to 03/31/02 for E01, E02, E04, E09, E11, E15, E21, R01, R02, R03, R04, R09, R11, R15 and R21
OR			Effective 08/31/01 to 04/30/02 for E14, E17, E20, R14, R17 and R20
Member elected no SS/Med in 1961 and has remained continuously employed since 04/01/86, transfer to a Miscellaneous position on or after 07/01/03			Effective 10/01/01 to 06/30/02 for E13 and R13
OR			Effective 07/01/03 for all CBID's
Member elected no SS/Med in 1961, has remained continuously employed since prior to 04/01/86. At some point the member elected Second-Tier, now the member elects First-Tier on or after 07/01/03			Effective 10/1/03-09/30/04 for E02, E03, E06, E07, E12, E13, E18, R02, R03, R06, R07, R12, R13 and R18
			Effective 10/01/04 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E17, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R17, R19, R20, R21 and S01-S21
			07 Effective 08/31/01 to 06/30/03 for C01-C21, E, E05, E06, E07, E08, E10, E12, E16, E18, E19, E48, E50, E58, E59, E68, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R05, R07, R06, R08, R10, R12, R16, R18, R19 and S01-S21
			Effective 08/31/01 to 09/30/01 for E13 and R13
			Effective 05/01/02 to 06/03/03 for E17 and R17
			Effective 07/01/02 to 06/30/03 for E13 and R13
			05 Effective 04/01/02 to 06/30/03 for E01, E02, E03, E04, E09, E11, E15, E21, R01, R02, R03, R04, R09, R11, R15 and R21
			Effective 05/01/02 to 06/30/03 for E14, E20, R14 and R20

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

MISCELLANEOUS FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
(Cont.)	Misc. First-Tier	N	<p><u>05 (cont.)</u> Effective 10/01/03 to 09/30/04 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E17, E18, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R17, R19, R20, R21 and S01-S21</p> <p><u>4C</u> Effective 09/01/04 to current for E18 and R18 employed by Dept of Developmental Services, Porterville Developmental Center</p> <p><u>4K</u> Effective 07/01/06 for R02</p>
<p>Member with SS/Med, continuously employed since prior to 01/01/85, who never elected Second Tier coverage</p> <p>OR</p> <p>Second-Tier member elected First-Tier, coverage on or after 01/01/85</p> <p>OR</p> <p>Member hired on or after 01/01/00</p> <p>OR</p> <p>Member has Industrial Disability Rights per Government Code 20047.5</p>	Misc. First-Tier	O	<p><u>08</u> Effective 07/01/74 to 12/31/99</p> <p><u>45</u> Effective 01/01/00 to 08/30/01 for all CBID's</p> <p>Effective 08/31/01 to 03/31/02 for E01, E02, E03, E04, E09, E11, E15, E21, R01, R02, R03, R04, R09, R11, R15 and R21</p> <p>Effective 08/31/01 to 04/30/02 for E14, E17, E20, R14, R17 and R20</p> <p>Effective 10/01/01 to 06/30/02 for E13 and R13</p> <p>Effective 07/01/03 for all CBID's</p> <p>Effective 10/01/03 to 09/30/04 for E02, E03, E07, E12, E13, E18, R02, R03, R07, R12, R13 and R18</p> <p>Effective 10/01/04 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R19, R20, R21 and S01-S21</p> <p><u>24</u> Effective 08/31/01 to 06/30/03 for C01-C21, E, E05, E06, E07, E08, E10, E12, E16, E18, E19, E48, E50, E58, E59, E68, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R06, R05, R07, R08, R10, R12, R16, R18, R19 and S01-S21</p>

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

MISCELLANEOUS FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
(Cont.)	Misc. First-Tier	O	<p>24 (Cont.) <u>Effective 08/31/01 to 09/30/01</u> for E13 and R13</p> <p><u>Effective 05/01/02 to 06/30/03</u> for E17 and R17</p> <p><u>Effective 07/01/02 to 06/30/03</u> for E13 and R13</p> <p><u>Effective 10/01/03 to 09/30/04</u> for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E17, E18, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R17, R19, R20, R21 and S01-S21</p> <p>25 <u>Effective 04/01/02 to 06/30/03</u> for E01, E02, E03, E04, E09, E11, E15, E21, R01, R02, R03, R04, R09, R11, R15 and R21</p> <p><u>Effective 05/01/02 to 06/30/03</u> for E14, E20, R14 and R20</p> <p>4B <u>Effective 09/01/04 to current</u> for E18 and R18 employed by Dept of Developmental Services, Porterville Developmental Center</p> <p><u>Effective 01/01/07 to current</u> for E18 and R18 employed by Dept of Developmental Services, Southern California Facility and Sierra Vista Facility.</p> <p>4G <u>Effective 07/01/06</u> for R02</p> <p>4T <u>Effective 10/31/07 to current</u> for E12 and R12 employed by the Dept of Transportation</p>
Miscellaneous members hired on or after 07/01/06 in unit 2 with prior CalPERS service	Misc. First-Tier	O	<p>4H <u>Effective 07/01/06</u> for R02</p>
Judicial Council employees in classes 2204, 2208, 2468, 2469, 3195, 3196, 3197, 3199, 3574 3590, 3814 and 5072	Misc. First-Tier	O	<p>4J <u>Effective 07/01/06</u> to current</p>
Miscellaneous members newly hired to the State on or after 01/01/07 in CBID's E01, E03, E04, E07, E10-E21, R01, R03, R04, R07 and R10-R21 or completed 24 months of ARP participation on code TJ	Misc. First-Tier	O	<p>4L <u>Effective 01/01/07</u> to current</p> <p>4P <u>Effective 01/01/07 to current</u> for E18 and R18 employed at Porterville Developmental Center</p>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

MISCELLANEOUS FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
OR Member had prior non-state CalPers service (ex: County of Sacramento)			Effective 01/01/07 to current for E18 and R18 employed by the Dept of Developmental Services, Southern California Facility and Sierra Vista Facility.
OR Member has Industrial Disability Rights per Government Code 20047.5			<u>4X</u> Effective 10/31/07 to current for E12 and R12 employed at Dept of Transportation
Member elected no SS/Med in 1961, at some point permanently separated. Then reappointed on or after 04/01/86 OR Member elected Second-Tier, then later elects First-Tier on or after 07/01/03 OR Member elected no SS/Med in 1961, at some point permanently separated. Then reappointed on or after 04/01/86. Later transfer to a Miscellaneous position on or after 07/01/03	Misc. First-Tier	M	<u>20</u> Effective 04/01/86 to 12/31/99 <u>42</u> Effective 01/01/00 to 8/30/01 for all CBID's Effective 08/31/01 to 03/31/02 for E01, E02, E03, E04, E09, E11, E15, E21, R01, R02, R03, R04, R09, R11, R15 and R21 Effective 08/31/01 to 04/30/02 for E14, E17, E20, R14, R17 and R20 Effective 10/01/01 to 06/30/02 for E13 and R13 Effective 07/01/03 for all CBID's Effective 10/01/03 to 09/30/04 for E02, E03, E07, E12, E13, E18, R02, R03, R07, R12, R13 and R18 Effective 10/01/04 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R19, R20, R21 and S01-S21 <u>09</u> Effective 08/31/01 to 06/30/03 for C01-C21, E, E05, E07, E08, E10, E12, E16, E18, E48, E50, E58, E59, E68, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R05, R07, R08, R10, R12, R16, R18, R19 and S01-S21 Effective 08/31/01 to 09/30/01 for E13 and R13 Effective 05/01/02 to 06/30/03 for E17 and R17

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

MISCELLANEOUS FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
			<u>06</u> Effective 04/01/02 to 06/30/03 for E01, E02, E03, E04, E09, E11, E15, E21, R01, R02, R03, R04, R09, R11, R15 and R21 Effective 10/01/03 to 09/30/04 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E17, E18, E19, E20, E21, E48, E50, E58, E59, E68, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R17, R19, R20, R21 and S01-S21
Member with SS/Med and employed at CHP or Justice in one of the following classes: 1662, 1663, 1664, 1665, 8460, 8466, 8467, 8472, 8473, 8477 or 8478 OR Second-tier member employed by CHP or Justice in one of the following classes: 1662, 1663, 1664, 1665, 8460, 8466, 8467, 8472, 8473, 8477 and 8478 (GC 21151), who were eligible to elect First-Tier coverage on or after 11/01/88.	Misc. First-Tier	O	<u>43</u> Effective 01/01/00 to 06/30/04 * Effective 07/01/04 E07 and R07 were moved to Safety Code 19 or 30 <u>4A</u> Effective 10/01/03 to current for C07, M07 and S07 in class 1662, 1665, 8567, 8473 or 8477
Member elected no SS/Med in 1961. At some point permanently separated, then reappointed on or after 04/01/86 and elected to return to First-Tier with CHP or Justice in one of the following classes: 1662, 1663, 1664, 1665, 8460, 8466, 8467, 8472, 8473 or 8477	Misc. First-Tier	M	<u>23</u> Effective 01/01/00 to 06/30/04 * Effective 07/01/04 R07 moved to Safety code 19
MISCELLANEOUS MODIFIED FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
Second-Tier Miscellaneous member by election with SS/Med pRevisediously in "03", "04" or "41"	Misc. Modified First-Tier	O	<u>26</u> Effective 08/01/98 to 12/31/99 (Modified First-Tier abolished 01/01/00, all members moved to "45")

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

MISCELLANEOUS SECOND-TIER

Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
<p>Member with no SS/Med, continuously employed since prior to 04/01/86, elected (in 01/01/85, 01/01/86, 01/01/87 or 01/01/88 election) Second-Tier coverage retroactively for all past and future service (GC 21070)</p> <p>OR</p> <p>Member is non-resident alien not subject to SS/Med (F-1, J-1 or M-1 Visa) (Item 545 = A) who made the above election</p>	Misc. Second-Tier	N	<p><u>01</u></p> <p><u>Effective 01/01/85</u></p>
<p>Member with no SS/Med, continuously employed since prior to 04/01/88, elected (in 01/01/85, 01/01/86, 01/01/87 or 01/01/88 election) Second-Tier coverage retroactively for future service only</p> <p>OR</p> <p>Member who has permanently separated and returned to State service between 01/01/85 and 03/31/86, mandatory placed in Second-Tier retirement for future service only (GC 21070)</p> <p>OR</p> <p>Member is non-resident alien not subject to SS/Med (F-1, J-1 or M-1 Visa) (Item 545 = A) employed between 01/01/85 and 12/31/99</p>	Misc. Second-Tier	N	<p><u>02</u></p> <p><u>Effective 04/01/86</u></p>
<p>Member with SS/Med elected Second-Tier coverage in 01/01/85, 01/01/86, 01/01/87 or 01/01/88 election, retroactively for past and future service (GC 21070)</p> <p>OR</p> <p>Member has Industrial Disability Rights per Governments Code 20047.5</p>	Misc. Second-Tier	O	<p><u>03</u></p> <p><u>Effective 01/01/85</u></p> <p><u>4E</u></p> <p><u>Effective 09/01/04 to current</u> for E18 and R18 employed by Dept of Developmental Services, Porterville Developmental Center</p> <p><u>Effective 01/01/07 to current</u> for E18 and R18 employed by Dept of Developmental Services, Southern California Facility and Sierra Vista Facility.</p>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

<u>MISCELLANEOUS SECOND-TIER</u>			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
(Cont.)			<u>4R</u> Effective 10/31/07 to current for E12 and R12 employed by the Dept of Transportation
Member with SS/Med elected Second-Tier coverage, in 01/01/85, 01/01/86, 01/01/87 or 01/01/88 election for future service only (GC 21070) OR New members who was appointed between 01/01/85 and 10/31/88 OR Member has Industrial Disability Rights per Government Code 20047.5	Misc. Second-Tier	O	<u>04</u> Effective 01/01/85 <u>4F</u> Effective 09/01/04 to current for E18 and R18 employed by Dept of Developmental Services, Porterville Developmental Center Effective 01/01/07 to current for E18 and R18 employed by Dept of Developmental Services, Southern California Facility and Sierra Vista Facility.
Member elected no SS/Med in 1961 and at some time permanently separated, then reappointed between 04/01/86 and 12/31/99 OR Member elected Second Tier for future service only. Permanently separated and then reappointed between 04/01/86 and 12/31/99 OR Member reappointed on or after 01/01/00, initially in First-Tier, then elected to go to Second-Tier for future service only	Misc. Second-Tier	M	<u>21</u> Effective 04/01/86
Member elected no SS/Med in 1961 and at some point permanently separates. Member elected Second-Tier for all past and future service. Reappoints between 04/01/86 and 12/31/99	Misc. Second-Tier	M	<u>22</u> Effective 04/01/86

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

MISCELLANEOUS SECOND-TIER

Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
<p>Member with SS/Med elected Second-Tier coverage per AB 1104 General Election (11/01/88 through 10/31/89 or effective 01/01/95)</p> <p>OR</p> <p>Member appointed or reappointed between 11/01/88 and 12/31/99</p> <p>OR</p> <p>Member appointed on or after 01/01/00, initially placed in First-Tier then elected Second-Tier for future service only</p> <p>OR</p> <p>Member has Industrial Disability Rights per Government Code 20047.5</p>	Misc. Second-Tier	O	<p>41 Effective 11/01/88 to current</p> <p>4D Effective 09/01/04 for E18 and R18 employed by Dept of Developmental Services, Porterville Developmental Center</p> <p>Effective 01/01/07 to current for E18 and R18 employed by Dept of Developmental Services, Southern California Facility and Sierra Vista Facility.</p> <p>4S Effective 10/31/07 for E12 and R12 employed by Dept of Transportation</p>
<p>Miscellaneous members newly hired to the State initially placed in ARP then elected Second-Tier for future service only.</p> <p>OR</p> <p>Member has Industrial Disability Rights per Government Code 20047.5</p>	Misc. Second-Tier	O	<p>4Y Effective 01/01/07 to current for R01, R03, R04, R07, R10-R21, E01, E03, E04, E07, E10-E21.</p> <p>Effective 07/01/06 to current for R02 or E02.</p> <p>4Z Effective 01/01/07 to current for E18 and R18 employed by Dept of Developmental Services, Southern California Facility and Sierra Vista Facility.</p>
<p>Member with SS/Med employed by CHP or Justice in class following classes: 1662, 1663, 1664, 1665, 8460, 8466, 8467, 8472, 8473, 8477 or 8478 who elected Second-Tier for all past and future service per AB 1104 General Election (11/01/88 through 10/31/89 or effective 01/01/95)</p> <p>OR</p> <p>Member appointed by CHP or Justice to one of the classes listed above who qualifies for membership between 11/01/88 and 01/01/00</p>	Misc. Second-Tier	O	<p>44 Effective 11/01/88</p> <p>* Effective 07/01/04 R07 moved to Safety code 19</p>

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

INDUSTRIAL FIRST-TIER

Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
Member elected no SS/Med in 1961 and has remained continuously employed since prior to 04/01/86	Indus. First-Tier	N	<u>90</u> Effective 01/01/75 to 12/31/99
OR			<u>46</u> Effective 01/01/00 to 08/30/01 for all CBID's
Member is non-resident alien not subject to SS/Med (F-1, J-1 or M-1 Visa) (item 545 = A)			Effective 08/31/01 to 03/31/02 for E01, E02, E04, E09, E11, E15, E21, R01, R02, R03, R04, R09, R11, R15 and R21
OR			Effective 08/31/01 to 04/30/02 for E14, E17, E20, R14, R17 and R20
Member elected no SS/Med in 1961 and has remained continuously employed since prior to 04/01/86 and moves to an Industrial position on or after 07/01/2003			Effective 10/01/01 to 06/30/02 for E13 and R13
OR			Effective 07/01/03 for all CBID's
Member elected no SS/Med in 1961 and has remained continuously employed since prior to 04/01/86. At some point the member elected Second-Tier, now member elects First-Tier on or after 07/01/03			Effective 10/1/03 to current for E02, E03, E07, E12, E13, E18, R02, R03, R07, R12, R13 and R18
			Effective 10/01/04 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R19, R20, R21 and S01-S21
			<u>93</u> Effective 08/31/01 to 06/30/03 for C01-C21, E, E05, E06, E07, E08, E10, E12, E16, E18, E48, E50, E58, E59, E68, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R05, R06, R07, R08, R10, R12, R16, R18, R19 and S01-S21
			Effective 08/31/01 to 09/30/01 for E13 and R13
			Effective 05/01/02 to 06/03/03 for E17 and R17
			Effective 07/01/02 to 06/30/03 for E13 and R13
			Effective 10/01/03- 09/30/04 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E17, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R17, R19, R20, R21 and S01-S21

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

INDUSTRIAL FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
(Cont.)	Indus. First-Tier	N	<p style="text-align: center;"><u>29</u></p> <p>Effective 04/01/02 to 06/30/03 for E01, E02, E03, E04, E09, E11, E15, E21, R01, R02, R03, R04, R09, R11, R15 and R21</p> <p>Effective 05/01/02 to 06/30/03 for E14, E20, R14 and R20</p>
<p>Member elected no SS/Med in 1961 and at some point permanently separates, the reappointed on or after 04/01/86</p> <p>OR</p> <p>Moves to an industrial position on or after 07/01/03</p> <p>Or</p> <p>Now elects First-Tier on or after 07/01/03</p>	Indus. First-Tier	M	<p style="text-align: center;"><u>48</u></p> <p>Effective 01/01/00 to 08/30/01 for all CBID's</p> <p>Effective 08/31/01 to 03/31/02 for E01, E02, E03, E04, E09, E11, E15, E21, R01, R02, R03, R04, R09, R11, R15 and R21</p> <p>Effective 10/01/01 to 06/30/02 for E13 and R13</p> <p>Effective 07/01/03 to 09/30/03 for all CBID's</p> <p>Effective 10/01/03 for E02, E03, E07, E12, E13, E18, R02, R03, R07, R12, R13 and R18</p> <p>Effective 10/01/04 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R19, R20, R21 and S01-S21</p> <p style="text-align: center;"><u>97</u></p> <p>Effective 08/31/01 to 06/30/03 for C01-C21, E, E05, E06, E07, E08, E10, E12, E16, E18, E48, E50, E58, E59, E68, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R05, R06, R07, R08, R10, R12, R16, R18, R19 and S01-S21</p> <p>Effective 08/31/01 to 09/30/01 for E13 and R13</p> <p>Effective 05/01/02 to 06/03/03 for E17 and R17</p> <p>Effective 07/01/02 to 06/30/03 for E13 and R13</p> <p>Effective 10/01/03 to 09/30/04 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E17, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R17, R19, R20, R21 and S01-S21</p>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

INDUSTRIAL FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
(Cont.)	Indus. First-Tier	M	<p><u>73</u> Effective 04/01/02 to 06/30/03 for E01, E02, E03, E04, E09, E11, E15, E21, R01, R02, R03, R04, R09, R11, R15 and R21</p> <p>Effective 05/01/02 to 06/30/03 for E14, E20, R14 and R20</p>
<p>Member with SS/Med continuously employed since prior to 01/01/85 who never elected Second-Tier</p> <p>OR</p> <p>Second-Tier member who elected First-Tier coverage since on or after 01/01/85</p> <p>OR</p> <p>Member hired on or after 01/01/00</p>	Indus First-Tier	O	<p><u>49</u> Effective 01/01/00 to 08/30/01 for all CBID's</p> <p>Effective 08/31/01 to 03/31/02 for E01, E02, E04, E09, E11, E15, E21, R01, R02, R03, R04, R09, R11, R15 and R21</p> <p>Effective 08/31/01 to 04/30/02 for E14, E17, E20, R14, R17 and R20</p> <p>Effective 10/01/01 to 06/30/02 for E13 and R13</p> <p>Effective 07/01/03 for all CBID's</p> <p>Effective 10/1/03 to current for E02, E03, E07, E12, E13, E18, R02, R03, R07, R12, R13 and R18</p> <p>Effective 10/01/04 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E17, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R17, R19, R20, R21 and S01-S21</p> <p><u>99</u> Effective 08/31/01 to 06/30/03 for C01-C21, E, E05, E06, E07, E08, E10, E12, E16, E18, E19, E48, E50, E58, E59, E68, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R05, R06, R07, R08, R10, R12, R16, R18, R19 and S01-S21</p> <p>Effective 08/31/01 to 09/30/01 for E13 and R13</p> <p>Effective 07/01/02 to 06/03/03 for E13 and R13</p> <p>Effective 05/01/02 to 06/30/03 for E17 and R17</p> <p>Effective 10/01/03 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E17, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R17, R19, R20, R21 and S01-S21</p>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

INDUSTRIAL FIRST-TIER

Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
(Cont.)	Indus First-Tier	O	<u>90</u> Effective 04/01/02 to 06/30/03 for E01, E02, E03, E04, E09, E11, E15, E21, R01, R02, R03, R04, R09, R11, R15 and R21 Effective 05/01/02 to 06/30/03 E14, E20, R14 and R20 <u>9A</u> Effective 07/01/06 for R02
Industrial member hired on or after 07/01/06	Indus First-Tier	O	<u>9B</u> Effective 07/01/06 for R02
Industrial member newly hired to the State on or after 01/01/07 or completes 24 months of ARP participation in code TS. OR Member had prior non-state CalPers service (ex: County of Sacramento)	Indus First-Tier	O	<u>9C</u> Effective 01/01/07 for E01, E03, E04, E07, E10, E11, E12, E13, E14, E15, E16, E17, E18, E19, E20, E21, R01, R03, R04, R05, R06, R07, R10, R11, R12, R13, R14, R15, R16, R17, R18, R19, R20 and R21

INDUSTRIAL MODIFIED FIRST-TIER

Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
Election by Second-Tier Industrial member with SS/Med, previously in 47, 95 or 96	Indus Modified First-Tier	O	<u>99</u> Effective 08/01/98 to 12/31/99 (Modified First-Tier abolished 01/01/00, members moved to "49")

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

INDUSTRIAL SECOND TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
<p>Member elected no SS/Med in 1961, continuously employed since prior to 04/01/86, elected (in 09/01/86, 01/01/87 or 01/01/88 election) Second-Tier coverage retroactively for all past and future service</p> <p>OR</p> <p>Member is non-resident alien not subject to SS/Med (F-1, J-1 or M-1 Visa) (Item 545 = A)</p>	Indus. Second-Tier	N	<p><u>91</u></p> <p>Effective 09/01/86</p>
<p>Member elected no SS/Med in 1961, continuously employed since prior to 04/01/86, elected (in 09/01/86, 01/01/87 or 01/01/88 election) Second-Tier coverage retroactively for all future service</p> <p>OR</p> <p>Member had permanent separation and returned to state service between 01/01/85 and 03/31/86, had mandatory placement in Second-Tier retirement formula for future service only</p> <p>OR</p> <p>Member is non-resident alien not subject to SS/Med (F-1, J-1 or M-1 Visa) (Item 545 = A) employed between 09/01/86 and 12/31/99</p>	Indus. Second-Tier	N	<p><u>92</u></p> <p>Effective 09/01/86 to current</p>
Member with SS/Med elected Second-Tier in 09/01/86, 01/01/87 or 01/01/88 election retroactively for all past and future service	Indus. Second-Tier	O	<p><u>95</u></p> <p>Effective 09/01/86</p>
<p>Member with SS/Med elected Second-Tier in 09/01/86, 01/01/87 or 01/01/88 election for future service only</p> <p>OR</p> <p>New member hired between 09/01/86 and 10/31/88</p>	Indus. Second-Tier	O	<p><u>96</u></p> <p>Effective 09/01/86</p>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

INDUSTRIAL SECOND-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
<p>Member elected no SS/Med in 1961. At some point permanently separated, then reappointed between 04/01/86 and 12/31/99.</p> <p>OR</p> <p>Member elected Second-Tier for future service only. Permanently separated and reappointed between 04/01/86 and 12/31/99</p> <p>OR</p> <p>Member reappointed on or after 01/01/00, initially placed in First-Tier then elected to go to Second-Tier for future service only</p>	Indus. Second-Tier	M	<p><u>98</u></p> <p>Effective 09/01/86</p>
<p>Member elected Second-Tier coverage per AB 1104 General Election 11/01/88 through 10/31/89 or effective 01/01/95</p> <p>OR</p> <p>Member appointed or reappointed between 11/01/88 and 12/31/99</p> <p>OR</p> <p>Member appointed or reappointed on or after 01/01/00 initially placed in First-Tier then elected to go to Second-Tier for future service only</p>	Indus. Second-Tier	O	<p><u>47</u></p> <p>Effective 11/01/88</p>
Industrial member newly hired to the State on initially placed in ARP then elected Second-Tier for future service only.	Indus. Second-Tier	O	<p><u>9D</u></p> <p>Effective 01/01/07 for R01, R03, R04, R07, R10-R21, E01, E03, E04, E07, E10-21.</p> <p>Effective 07/01/06 to current for R02 or E02.</p>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

<u>SAFETY FIRST-TIER</u>			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
Miscellaneous/Industrial member continuously employed prior to 04/01/86 reclassified to State Safety, elected to retain their prior Miscellaneous/Industrial First-Tier retirement formula	Safety First-Tier	N	<p><u>10</u> Effective 08/31/01 to 03/31/02 for E01, E02, E03, E04, E05, E08, E09, E11, E15, E21, R01, R02, R03, R04, R05, R08, R09, R11, R15 and R21</p> <p>Effective 08/31/01 to 04/30/02 for E14, E17, E20, R14, R17 and R20</p> <p>Effective 07/01/03 for all CBID's</p> <p>Effective 10/1/03 to 09/30/04 for E02, E03, E07, E12, E13, E18, R02, R03, R07, R12, R13 and R18</p> <p>Effective 10/01/04 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R19, R20, R21 and S01-S21</p> <p><u>11</u> Effective 08/31/01 to 06/30/03 for C01-C21, E06, E07, E08, E10, E12, E13, E16, E18, E19, E48, E50, E58, E59, E68, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R05, R06, R07, R08, R10, R12, R16, R18, R19 and S01-S21</p> <p>Effective 05/01/02 to 06/30/03 for E17 and R17</p> <p>Effective 10/01/03 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E17, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R17, R19, R20, R21 and S01-S21</p> <p><u>6C</u> Effective 05/01/02 to 06/30/03 for E02 and R02</p> <p><u>6H</u> Effective 05/01/02 to 06/30/03 for E20 and R20</p> <p><u>1A</u> Effective 07/01/06 for R02</p>
Miscellaneous/ Industrial member re-classed to State Safety, elected to retain their prior retirement formula. Permanently separated, reappointed to a Safety classification on or after 0/01/89	Safety First-Tier	M	<p><u>12</u> Effective 01/01/89 to 08/30/01 for all CBID's</p> <p>Effective 08/31/01 to 06/30/03 for E01, E02, E03, E04, E05, E08, E09, E11, E15, E21, R01, R02, R03, R04, R05, R08, R09, R11, R15 and R21</p>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

<u>SAFETY FIRST-TIER</u>			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
<p>(Cont.)</p> <p>OR</p> <p>Miscellaneous/Industrial member hired after 04/01/86 and reclassified to State Safety who elected to retain their prior Miscellaneous/Industrial First-Tier retirement formula</p>	Safety First-Tier	M	<p><u>12 (Cont.)</u></p> <p><u>Effective 08/31/01 to 04/30/02</u> E17 and R17</p> <p><u>Effective 07/01/03</u> for all CBID's</p> <p><u>Effective 10/01/03</u> for E02, M18, R18, S18</p> <p><u>Effective 07/01/04</u> for E17 and R17</p> <p><u>Effective 10/01/04</u> for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R19, R20, R21 and S01-S21</p> <p><u>33</u></p> <p><u>Effective 08/31/01 to 06/30/03</u> for C01-C21, E, E06, E07, E10, E12, E13, E16, E18, E19, E48, E50, E58, E59, E68, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R06, R07, R10, R12, R13, R16, R18, R19 and S01-S21</p> <p><u>Effective 05/01/02 to 06/30/03</u> for E17 and R17</p> <p><u>Effective 10/01/03</u> for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E17, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R17, R19, R20, R21 and S01-S21</p>
<p>Member who entered a State Safety position on or after 4/01/86</p> <p>OR</p> <p>Member, who enters state service prior to 04/01/86, permanently separates and then reappoints on or after 04/01/86. Later transfers to a safety classification on or after 4/01/86</p> <p>OR</p> <p>Member who enters a Safety position on or after 07/01/03</p>	Safety First-Tier	M	<p><u>82</u></p> <p><u>Effective 7/01/74 to 12/31/99</u></p> <p><u>19</u></p> <p><u>Effective 1/01/00 to 08/30/01</u> for all CBID's</p> <p><u>Effective 07/01/03 to 09/30/03</u> for all CBID's</p> <p><u>Effective 10/01/03 to 09/30/04</u> for E02, E03, E7, E12, E13, E18, R02, R03, R07, R12, R13, R18</p> <p><u>Effective 10/01/04</u> for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E17, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R17, R19, R20, R21 and S01-S21</p>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

SAFETY FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
(Cont.)	Safety First-Tier	M	<p><u>67</u> Effective 08/31/01 to 06/01/03 for C01-C21, E07, E10, E12, E13, E16, E18, E19, E48, E50, E58, E59, E68, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R07, R10, R12, R13, R16, R18, R19 and S01-S21</p> <p>Effective 10/01/03 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E17, E19, E20, E48, E50, E58; E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R17, R19, R20 and S01-S21</p> <p><u>63</u> Effective 10/01/01 to 03/31/02 for E01, E02, E03, E04, E09, E11, E15, E17, E20, R01, R02, R03, R04, R09, R11, R15, R17 and R20</p> <p>Effective 10/01/01 to 04/30/02 for E02, E17, E20, R02, R17 and R20</p> <p>Effective 10/01/01 to 06/30/02 for E13 and R13</p> <p><u>59</u> Effective 04/01/02 to 06/30/03 for E01, E03, R01 and R03</p> <p><u>70</u> Effective 04/01/03 to 06/30/03 for E04, E11, E15, R04, R11 and R15</p> <p><u>6F</u> Effective 04/01/02 to 06/30/03 for E09 and R09</p> <p><u>6A</u> Effective 05/01/02 to 06/30/03 for E02 and R02</p> <p><u>6D</u> Effective 05/01/02 to 06/30/03 for E20 and R20</p> <p><u>6J</u> Effective 07/01/06 for R02</p>
All Safety Members hired on or after 7/1/06 in BU2	Safety First Tier	M	<p><u>6L</u> Effective 07/01/06 for R02</p>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

SAFETY FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
Enters into a membership as a State Safety position on or after 1/01/07 in units 1, 3, 4, 7, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20 or 21	Safety First Tier	N	<u>6R</u> Effective 01/01/07
New to State service on or after 1/01/07 in units 1, 3, 4, 7, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20 or 21	Safety First Tier	M	<u>6P</u> Effective 01/01/07
All Safety Members hired on or after 7/1/06 in BU2	Safety First Tier	N	<u>6M</u> Effective 01/01/07 to current
Safety member has been continuously employed since prior to 04/01/86 OR Member is non-resident alien not subject to SS/Med (F-1, J-1 or M-1 Visa) (Item 545 = A)	Safety First-Tier	N	<u>30</u> Effective 01/01/00 to 12/31/01 for E06 and R06 Effective 07/01/03 to 09/30/03 for all CBID's Effective 10/01/03 to current for R02, E03, E07, E12, E13, E18, R02, R03, R07, R12, R13 and R18 Effective 10/01/04 for all CBID's <u>68</u> Effective 08/31/01 to 06/30/03 for C01-C21, E, E06, E07, E10, E12, E16, E18, E19, E48, E50, E58, E59, E68, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R06, R07, R10, R12, R16, R18, R19 and S01-S21 Effective 08/31/01 to 06/30/03 for E13 and R13 Effective 05/01/02 to 06/30/03 for E17 and R17 Effective 10/01/03 for C01-C21, E, E01, E04, E05, E08, E09, E10, E11, E14, E15, E16, E17, E19, E20, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R01, R04, R05, R08, R09, R10, R11, R14, R15, R16, R17, R19, R20, R21 and S01-S21 <u>64</u> Effective 10/01/01 to 06/30/03 for E01, E03, E04, E09, E11, E15, R01, R03, R04, R09, R11 and R15 Effective 10/01/01 to 04/30/02 for E02, E17, E20, R02, R17 and R20 Effective 10/01/01 to 06/30/02 for E13 and R13 <u>65</u> Effective 04/01/02 to 06/30/03 for E01, E03, R01 and R03

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

SAFETY FIRST-TIER

Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
(Cont.)	Safety First-Tier	N	<p><u>69</u> Effective 04/01/02 to 06/30/03 for E04, E11, E15, R04, R11 and R15</p> <p><u>6G</u> Effective 04/01/02 to 06/30/03 for E09 and R09</p> <p><u>6B</u> Effective 05/01/02 to 06/30/03 for E02 and R02</p> <p><u>6E</u> Effective 05/01/02 to 06/30/03 for E20 and R20</p> <p><u>6K</u> Effective 07/01/06 for R02</p>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

<u>SAFETY FIRST-TIER</u>			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
<p>Safety member employed by Forestry (GC 20400) who entered State service on or after 4/01/86</p> <p>OR</p> <p>Member who permanently separated, the reappointed to a Safety classification (for Department of Forestry) on or after 4/01/86</p>	Safety First Tier	M	<p><u>71</u> Effective 04/01/86 to 12/31/99 for all CBIDs</p> <p><u>17</u> Effective 1/01/00 to 08/30/01 for all CBIDs</p> <p>(On 08/31/01 C01-C21, E, E07, E08, E10, E13, E16, E18, E19, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R07, R08, R10, R12, R13, R15, R16, R18, R19, R21 and S01-S21 were moved to code 67)</p> <p>(On 10/01/01 E01, E02, E03, E04, E09, E11, E15, E17, E20, R01, R02, R03, R04, R09, R11, R15, R17 and R20 were moved to code 63)</p>
Safety Members employed by the Department of Forestry, continuously employed since prior to 04/01/86	Safety First Tier	N	<p><u>75</u> Effective 07/01/74 to 12/31/99</p> <p><u>18</u> Effective 01/01/00 to 08/30/01 for all CBID's</p> <p>(On 08/31/01 C01-C21, E, E07, E08, E10, E13, E16, E18, E19, E21, E48, E50, E58, E59, E67, E68, E77, E78, E79, E88, E89, E92, E97, E98, E99, M01-M21, R07, R08, R10, R12, R13, R15, R16, R18, R19, R21 and S01-S21 were moved to code 68)</p> <p>(On 10/01/01 E01, E02, E03, E04, E09, E11, E15, E17, E20, R01, R02, R03, R04, R09, R11, R15, R17 and R20 were moved to code 64)</p>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

<u>SAFETY SECOND-TIER</u>			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
<p>Miscellaneous/Industrial member reclassified to Safety elected to retain their prior Miscellaneous/Industrial Second-Tier retirement formula. Hired prior to 04/01/06, permanently separated and then reappointed to State service after 04/01/06. Later reclassified to a Safety classification on or after 01/01/89</p> <p>OR</p> <p>Miscellaneous/Industrial member hired after 04/01/86 and reclassified to Safety elected to retain their prior Miscellaneous/Industrial Second-Tier retirement formula.</p>	Safety Second-Tier	M	<p><u>Effective 01/01/89</u></p> <p><u>13</u></p>
<p>Miscellaneous/Industrial member reclassified to State Safety, elected to retain their prior Miscellaneous/Industrial retirement formula. Continuously employed since prior to 04/01/86</p>	Safety Second-Tier	N	<p><u>Effective 01/01/89</u></p> <p><u>14</u></p>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

POFF FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
Members who have been continuously employed by the State since prior to 04/01/86 OR Members continuously employed since prior to 04/01/86 and later enters into a POFF position on or after 01/01/00	POFF First-Tier	N	<u>75</u> Effective 07/01/75 to 06/30/84 employees in 75 reclassified (not and election) to 72 <u>72</u> Effective 07/01/84 to 12/31/99 for BU 08 (employee with a POFF appointment effective between 07/01/84 -03/31/86) <u>15</u> Effective 10/01/98 to 12/31/99 for E08 and R08 Effective 07/01/99 to 12/31/99 for S08 and M08 <u>31</u> Effective 01/01/00 to 06/30/03 E08 and R08 <u>34</u> Effective 01/01/00 to 06/30/03 for S08 and M08 Effective 07/01/03 to 12/31/05 for E08 and R08 <u>5A</u> Effective 07/01/03 for S08 and M08 (see Appendix VI) <u>3A</u> Effective 01/01/06 for R08 (see Appendix V) <u>5L</u> Effective 01/01/06 for M08 and S08 (see Appendix VI)
Members who have been employed by the State on or after 04/01/86. OR Member who was hired on or after 04/01/86, later enters a POFF position on or after 01/01/00	POFF First-Tier	M	<u>74</u> Effective 07/01/86 to 12/31/99 for BU 08 (employee with a POFF appointment effective 07/01/84 -03/31/86) <u>16</u> Effective 10/01/98 to 12/31/99 for E08 and R08 Effective 07/01/99 to 12/31/99 for S08 and M08 <u>32</u> Effective 01/01/00 to 06/30/03 E08 and R08 <u>36</u> Effective 01/01/00 to 06/30/03 for S08 and M08 Effective 07/01/03 to 12/31/05 for E08 and R08 <u>5B</u> Effective 07/01/03 for S08 and M08 (see Appendix VI)

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

POFF FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
Cont.	POFF First-Tier	M	<u>3B</u> Effective 01/01/06 for R08 (see Appendix VI) <u>5M</u> Effective 01/01/06 for M08 and S08 (see Appendix VI)
Members who have been employed by the State since prior to 04/01/86. Later enters into a POFF position on or after 01/01/00	POFF First-Tier	N	<u>78</u> Effective 04/01/95 to 12/31/99 <u>37</u> Effective 01/01/00 for R06 and C06 (see Appendix I) <u>3C</u> Effective 01/01/06 for R06 and C06 (see Appendix I)
Members who have been employed by the State on or after 04/01/86. Later enters into a POFF position on or after 01/01/00	POFF First-Tier	M	<u>38</u> Effective 01/01/00 for R06 and C06 (see Appendix VI) <u>3D</u> Effective 01/01/06 for R06 and C06 in one of the classifications listed in Appendix I
Members who have been employed by the State since prior to 04/01/86. Later enters into a POFF position on or after 01/01/00	POFF First-Tier	N	<u>80</u> Effective 07/01/84 to 12/01/99 <u>39</u> Effective 01/01/00 for members in or associated with BU 07 and non represented employees in S06 and M06 (see Appendix III and IV) <u>55</u> Effective 05/01/01 for S06 and E06 members employed with Dept of Corrections, Youth Authority, Board of Corrections and Board of Prison Terms in one of the classifications listed in Appendix I Effective 08/31/01 for remaining members form Appendix I in S06 and M06 <u>57</u> Effective 07/01/01 for R07 in one of the classifications listed in Appendix III Effective 08/31/01 for non represented employees associated with BU 07 (S07 and M07) in one of the classifications listed in Appendix IV <u>5C</u> Effective 10/01/03 for non represented employees associated with BU 07 (S07 and M07) in one of the classifications listed in Appendix IV

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

POFF FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
Cont.	POFF First-Tier	N	<p style="text-align: center;"><u>5E</u> Effective 01/01/04 for non represented employees associated with BU 07 (S07 and M07) in one of the classifications listed in Appendix IV</p> <p style="text-align: center;"><u>5G</u> Effective 01/01/04 for R07 in one of the classifications listed in Appendix III</p> <p style="text-align: center;"><u>5J</u> Effective 01/01/06 for S06 and M06 in classification listed in Appendix</p>
Safety member reclassified to POFF, elected to retain previous Safety retirement formula. Continuously employed since prior to 04/01/86	POFF First-Tier	N	<p style="text-align: center;"><u>8I</u> Effective 07/01/84 to 12/31/99</p>
Members who have been employed by the State on or after 04/01/86. Later enters into a POFF position on or after 01/01/00	POFF First-Tier	M	<p style="text-align: center;"><u>50</u> Effective 01/01/00 to 08/31/01</p> <p style="text-align: center;"><u>56</u> Effective 05/01/01 for S06 and E06 members employed with Dept of Corrections, Youth Authority, Board of Corrections and Board of Prison Terms in one of the classifications listed in Appendix II</p> <p style="text-align: center;"><u>58</u> Effective 07/01/01 for R07 in one of the classifications listed in Appendix III</p> <p style="text-align: center;"><u>5K</u> Effective 01/01/06 for S06 and M06 in classification listed in Appendix II</p> <p style="text-align: center;"><u>5D</u> Effective 10/01/03 for non represented members associated with BU 07 (S07 and M07) in one of the classifications listed in Appendix IV</p> <p style="text-align: center;"><u>5H</u> Effective 01/01/04 for R07 in one of the classifications listed in Appendix III</p>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

POFF FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates
Cont.	POFF First-Tier	M	<u>5F</u> Effective 01/01/04 for non represented members associated with BU 07 (S07 and M07) in one of the classifications listed in Appendix IV
Miscellaneous/Industrial member reclassified to State Safety elected to retain their prior Miscellaneous/Industrial First-Tier retirement Formula. Member reclassified again to POFF, elected again to retain their prior First-Tier. Continuously employed since prior to 04/01/86	POFF First-Tier	N	<u>85</u> Effective 07/01/84 to 12/31/99
Employee with no break in service since prior to 04/01/86, reclassified (not an election) to POFF (previously an Industrial code). Elected to retain previous retirement formula. Restricted to employee in BU 08	POFF First-Tier	N	<u>73</u> Effective 07/01/84 to 06/30/99 <u>Inactive 07/01/99</u>

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

Appendix I		
8217	Medical Technical Assistant (Correctional Facility)	R06
8221	Medical Technical Assistant (Psychiatric)	R06
9001	Fire Captain, Correctional Institution	R06
9016	Fire Service Training Specialist, Correctional Facility	R06
9579	Youth Correctional Counselor	R06
9581	Youth Correctional Officer	R06
9662	Correctional Officer	R06
9694	Board Coordinating Parole Agent, Youthful Offender Parole Board	R06
9696	Parole Agent II, Youth Authority (Specialist)	R06
9701	Parole Agent I, Youth Authority	R06
9762	Parole Agent II, Adult Parole (Specialist)	R06
9765	Parole Agent, Adult Parole	R06
9901	Correctional Counselor II (Specialist)	R06
9904	Correctional Counselor	R06
9911	Casework Specialist, Youth Authority	R06
9901	Correctional Counselor II (Specialist)	R06

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

Appendix II		
0141	Director, Division of Juvenile Facilities, Dept of Corrections	E99
0321	Chief Deputy Secretary, Office of Correctional Safety, Dept of Corrections	E99
0533	Director of Adult Institutions	E99
1526	Chief, Internal Affairs, Field Operations	E99
2070	Director of Juvenile Parole Operations	E99
5507	Director, Division of Adult Institutions	E99
7912	Inspector General	E99
8202	Health Program Coordinator, Correctional Facility	S06
8215	Senior Medical Technical Assistant	S06
8225	Senior Medical Technical Assistant (Psychiatric)	S06
8976	Fire Chief	S06
9076	Deputy Regional Administrator, Parole and Community Services Division	E99
9380	Deputy Director, Parole and Community Services Division	E99
9540	Chief Deputy Secretary, Juvenile Justice	E99
9556	Youth Authority Administrator, Rehabilitation Services	M06
9558	Youth Authority Administrator, Community and Staff Services	M06
9560	Program Administrator, Correctional School (Supervisory)	S06
9563	Program Administrator, Correctional School (Manager)	M06
9569	Captain, Youth Authority	S06
9570	Treatment Team Supervisor	S06
9571	Major, Youth Authority	S06
9574	Lieutenant, Youth Authority	S06
9577	Sergeant, Youth Authority	S06
9580	Senior Youth Correctional Counselor	S06
9600	Chief Deputy Secretary, Adult Operations	E99
9603	Assistant Deputy Director, Community and Inmate Programs	E99
9613	Field Representative	S06
9625	Warden	E99
9645	Correctional Administrator	M06
9646	Facility Captain	M06
9650	Correctional Captain	M06
9656	Correctional Lieutenant	S06
9659	Correctional Sergeant	S06
9691	Chief Deputy Administrator, Correctional Programs	M06
9695	Parole Agent III, Youth Authority	S06
9697	Parole Agent II, Youth Authority	S06
9705	Deputy Inspector General	E97
9706	Deputy Inspector General, Senior	E98
9707	Deputy Inspector General, In-Charge	E99
9746	Chief of Investigations, Board of Prison Terms	M06
9753	Parole Administrator II, Adult Parole	M06
9754	Parole Administrator I, Adult Parole	M06
9760	Parole Agent III, Adult Parole	S06
9763	Parole Agent II, Adult Parole (Supervisory)	S06
9764	Special Agent-in-Charge, Dept of Corrections	E99
9766	Special Agent, Dept of Corrections	E99
9767	Senior Special Agent, Dept of Corrections	E98
9902	Correctional Counselor II	S06
9903	Correctional Counselor II Supervisor	S06
9908	Supervising Casework Specialist II, Youth Authority	S06
9910	Supervising Casework Specialist I, Youth Authority	S06
9915	Chief Deputy Inspector General	E99

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

Appendix III		
0983	State Park Ranger	R07
0984	State Park Ranger -Intermittent-	R07
0992	Lifeguard	R07
1915	State Park Ranger Cadet	R07
1916	State Park Cadet (Lifeguard)	R07
1937	Hospital Police Officer	R07
1945	State Fair Police Officer	R07
1946	Sergeant, State Fair Police	R07
1954	Peace Officer I, Developmental Center	R07
1960	Security Officer, Department of Justice	R07
2278	Pipeline Safety Engineer	R07
7539	Fraud Investigator, Department of Insurance	R07
7553	Investigator Trainee, Alcoholic Beverage Control	R07
7554	Investigator I, Alcoholic Beverage Control	R07
7555	Investigator II, Alcoholic Beverage Control	R07
7568	Criminal Investigator, Employment development Department	R07
7574	Criminal Investigator, Department of Toxic Substances Control	R07
8005	Fish and Game Patrol Lieutenant (Specialist)	R07
8064	Fraud Investigator, Department of Health Services	R07
8122	Coordinator – Law Enforcement – O.E.S.	R07
8188	Coordinator (Fire and Rescue Services)	R07
8410	Warden – Pilot Department of Fish and Game	R07
8416	Lieutenant Fish and Game Patrol Boat	R07
8421	Fish and Game Warden, Department of Fish and Game	R07
8482	Special Agent, Department of Justice	R07
8514	Special Agent Trainee, Department of Justice	R07
8524	Special Agent Supervisor, Department of Justice	R07
8538	Investigator, Department of Motor Vehicles	R07
8550	Senior Special Investigator	R07
8553	Special Investigator I	R07
8554	Investigator Assistant (Specific Employers)	R07
8557	Special Investigator I, Departments of Mental Health and Developmental Services	R07
8558	Senior Special Investigator, Department of Mental Health and Developmental Services	R07
8570	Corporations Investigator	R07
8571	Associate Corporations Investigator	R07
8591	Investigation Specialist II (Technical), Franchise Tax Board	R07
8593	Investigation Specialist I, Franchise Tax Board	R07
8594	Investigator, Department of Consumer Affairs	R07
8595	Senior Investigator, Department of Consumer Affairs	R07
8602	Lottery Agent	R07
8793	Enforcement Representative I, Contractors State License Board	R07
8795	Enforcement Representative II, Contractors State License Board	R07
8894	Arson and Bomb Investigator Assistant	R07
8958	District Representative II, Division of Codes and Standards	R07
8960	District Representative I, Division of Codes and Standards	R07
8979	Fire Fighter	R07
8980	State Fire Marshal Trainee	R07
8989	Captain Firefighter/Security Officer	R07
8990	Firefighter/Security Officer	R07
8997	Arson and Bomb Investigator	R07
9013	Deputy State Fire Marshal III (Specialist)	R07
9028	Food and Drug Program Specialist	R07
9039	Senior Food and Drug Investigator	R07
9086	Deputy State Fire Marshal	R07

(Revised 05/08)

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

Appendix III (cont.)

9087	Fire Service Training Specialist	R07
9090	Fire Service Training Specialist II	R07
9506	Labor Standards Investigator	R07

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

Appendix IV

0971	State Park Superintendent V	M07
0973	State Park Superintendent IV	S07
0974	State Park Superintendent III	S07
0976	State Park Superintendent I	S07
0978	State Park Superintendent II	S07
0980	Supervising State Park Ranger	S07
0988	Lifeguard Supervisor II	S07
0991	Lifeguard Supervisor I	S07
1044	Lifeguard Supervisor IV	S07
1045	Lifeguard Supervisor III	S07
1145	Deputy Director, Division of Law Enforcement, Department of Justice	E99
1680	Deputy Director for Security, California State Lottery Commission	E99
1934	Chief, Protective Services and Security	M07
1935	Hospital Police Lieutenant	S07
1936	Hospital Police Sergeant	S07
1941	Chief, Exposition and State Fair Police	S07
1947	Lieutenant, State Fair Police	S07
1948	Captain, State Fair Police	S07
1955	Peace Officer II, Developmental Center	S07
1961	Security Officer II, Department of Justice	S07
2581	Supervising Pipeline safety Engineer	S07
5691	Director, Division of Law Enforcement, Department of Justice	E99
7541	Supervising Fraud Investigator I, Department of Insurance	S07
7542	Supervising Fraud Investigator II, Department of Insurance	S07
7543	Assistant Chief, Fraud Bureau, Department of Insurance	S07
7545	Chief, Fraud Bureau, Department of Insurance	M07
7569	Supervising Criminal Investigator I, Employment Development Department	S07
7571	Supervising Criminal Investigator II, Employment Development Department	S07
7572	Chief, Licensing and Enforcement, California Horse Racing Board, C.E.A	S07
7573	Chief, Licensing and Enforcement, California Horse Racing Board, C.E.A	S07
7575	Supervising Criminal Investigator I, Department of Toxic Substances Control	S07
7576	Supervising Criminal Investigator II, Department of Toxic Substances Control	S07
8065	Supervising Fraud Investigator I, Department of Health Services	S07
8066	Supervising Fraud Investigator II, Department of Health Services	S07
8120	Chief Law Enforcement Division O.E.S	S07
8121	Senior Coordinator, Law Enforcement, O.E.S	S07
8186	Chief (Fire and Rescue Service)	M07
8187	Senior Coordinator (Fire and Rescue Services)	S07
8405	Regional Patrol Chief, Department of Fish and Game	S07
8407	Senior Warden Pilot Department of Fish and Game	S07
8412	Fish and Game Patrol Captain	S07
8415	Captain Fish and Game Patrol Boat	S07
8418	Fish and Game Patrol Lieutenant (Supervisor)	S07
8483	Deputy Chief, Investigations and Enforcement, Department of Consumer Affairs	M07
8522	Senior Special Agent in Charge, Department of Justice	M07
8523	Special Agent in Charge, Department of Justice	M07
8534	Deputy Chief of Operations, Bureau of Narcotic Enforcement, Department of Justice	M07
8539	Supervising Investigator I, Department of Motor Vehicles	S07
8540	Supervising Investigator II, Department of Motor Vehicles	S07
8547	Supervising Special Investigator II	S07
8548	Supervising Special Investigator I	S07
8572	Supervising Corporations Investigator	S07
8573	Regional Manager, Corporations Investigations Program	S07
8585	Chief Investigator California Horse Racing Board	S07

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CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

Appendix IV(cont.)

8592	Investigation Specialist II (Supervisor), Franchise Tax Board	S07
8596	Supervising Investigator I, Department of Consumer Affairs	S07
8597	Supervising Investigator II Department of Consumer Affairs	S07
8600	Chief Lottery Agent	M07
8601	Supervising Lottery Agent	S07
8668	Chief Deputy Director, Alcoholic Beverage Control	E99
8673	Deputy Division Chief, Alcoholic Beverage Control	M07
8677	Director Alcoholic Beverage Control	E99
8678	Supervising Investigator, Alcoholic Beverage Control	S07
8681	Assistant Bureau Chief, Division of Law Enforcement, Department of Justice	M07
8682	Bureau Chief, Division of Law Enforcement, Department of Justice	M07
8683	Chief Investigator, Medi-Cal Fraud Unit, Department of Justice	M07
8684	Director, Division of Law Enforcement, Department of Justice, C.E.A.	M07
8963	Assistant State Fire Marshall	E99
8964	Chief Deputy Director, State Fire Marshall	E99
8966	Division Chief, California State Fire Marshall's Office	M07
8977	Fire Chief	S07
8988	Chief, Firefighter/Security Officer	S07
8999	Chief Arson and Bomb Investigator	M07
9010	Deputy State Fire Marshall III (Supervisor)	S07
9015	Senior Arson and Bomb Investigator	S07
9027	Chief, Food and Drug Field Operations Section	S07
9029	Food and Drug Regional Administrator	S07
9030	Chief, Food and Drug Branch	M07
9036	Supervising Food and Drug Investigator	S07
9091	Fire Service Training Supervisor	S07

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

Appendix V

1046	Forestry Fire Pilot	R08
1050	Air Operations Officer III – Maintenance	R08
1053	Air Operations Officer III	R08
1054	Forester I (Non-Supervisory)	R08
1056	Air Operations Officer II	R08
1060	Forestry Aid	R08
1077	Fire Apparatus Engineer	R08
1082	Fire Fighter II	R08
1083	Fire Fighter I	R08
1085	Forestry Technician	R08
1086	Forestry Assistant I	R08
1093	Forestry Assistant II	R08
1095	Fire Captain	R08
1755	Fire Fighter II (Paramedic)	R08
1756	Fire Apparatus Engineer (Paramedic)	R08
1757	Fire Captain (Paramedic)	R08
6387	Heavy Fire Equipment Operator	R08
6877	Air Operations Officer I – Maintenance	R08
9723	Battalion Chief (Non Supervisory)	R08

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

Appendix VI

1031	Forestry and Fire Protection Administrator	M08
1037	Unit Chief	M08
1038	Deputy Chief	S08
1039	Assistant Chief (Supervisory)	S08
1041	Forester III	S08
1042	Forester II (Supervisor)	S08
1051	Battalion Chief (Supervisor)	S08
1052	Senior Air Operations Officer	S08
1927	Forestry Logistics Officer II	S08
4850	Director Department of Forestry and Fire Prevention	E99
4851	Chief Deputy Director Department of Forestry and Fire Prevention	E99
6873	Forestry Equipment Manager I	S08
6874	Forestry Equipment Manager II	S08
6876	Senior Forestry Equipment Manager	S08
8963	Assistant State Fire Marshall Department of Forestry and Fire Prevention	E99
8569	Deputy Director, Training and Arson, Bomb Investigations, Department of Forestry and Fire Prevention	E99

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

CHP FIRST-TIER			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates*
Members in BU 05: Whose principle duties consist of law enforcement service (GC 20390) permanently separated and reappointed on or after 04/01/86 OR whose principle duties consist of law enforcement service (GC 20390) appointed to CHP on or after 04/01/86	CHP First-Tier	M	<u>60</u> Effective 04/01/86 to 12/31/99 <u>61</u> Effective 01/01/00 to current
Members in BU 05: Whose principle duties consist of law enforcement service (GC 20390) continuously employed since prior to 04/01/86	CHP First-Tier	N	<u>66</u> Effective 07/01/74 to 12/31/99 <u>62</u> Effective 01/01/00 to current
CHP Commissioner	CHP First-Tier	N	<u>65</u> Effective 07/01/07 to current
*Effective dates are based on employee elections and/or law changes. Transactions shall not be effective prior to date shown.			

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

JRS RETIREMENT SYSTEM			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates*
Member since prior to 04/01/86	JRS	N	<u>J</u> Effective 07/01/84 to current
Member appointed on or after 11/09/94	JRS (II)	M	<u>JF</u> Effective 11/09/94 to current
Member appointed on or after 04/01/86 and prior to 11/09/94	JRS	M	<u>JM</u> Effective 04/01/86 to current

JRS RETIREMENT SYSTEM

For employees appointed to statutory class codes 9999, 5991, 5998 and 5997. Employees are members of JRS from their first day in office do not need to meet any retirement eligibility and cannot opt out of retirement.

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

<u>LRS RETIREMENT SYSTEM</u>			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates*
For all Legislators and Constitutional Officers, except Judges who elected membership prior to 04/17/73	LRS	N	<u>L</u> Effective 07/01/74 to current
For all Legislators and Constitutional Officers, except Judges who first elected LRS membership after 04/17/72	LRS	O	<u>LO</u> Effective 07/01/74 to current

LRS RETIREMENT SYSTEM

For elected officers of the State whose office is provided by the Constitution (except Judges who elected membership prior to 04/17/72), Legislative Statutory Officers, the Insurance Commissioner and members of the Senate* or the Assembly* as defined in the Legislator's Retirement Law (9355, 9355.4, 9355.42 and 9355.45). They are eligible for retirement membership upon being elected and do not need to meet any eligibility requirements. These officers have the option of electing LRS membership within ninety days after beginning their term of office and may opt for membership in CalPERS at any time after entering office.

* Legislators who are newly elected/appointed to office on or after 11/01/90 are not eligible to participate in or become members of a retirement system as a result of the passage of Proposition 140. Legislators who are in office (incumbent senators and assemblymen) who are also members of a retirement system prior to 11/01/90 may continue as retirement members for the duration of their term of office. Once they become retirement members they can always be retirement members.

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

STRS RETIREMENT SYSTEM			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates*
Member of STRS	STRS	N	<u>T</u> Effective 07/01/74 to 08/30/01 <u>TB</u> Effective 08/31/01 to 06/30/03 <u>TC</u> Effective 07/01/03 to 09/30/04 Effective 10/01/04 to current
Member of STRS	STRS	M	<u>TA</u> Effective 01/01/2001 to 12/31/01 <u>TC</u> Effective 01/01/02-06/30/03 Effective 10/01/0 to current
STRS members not subject to collective bargaining, moved to this code 08/31/01. Rank and File members moved to this code 01/01/02	STRS	N	<u>TB</u> Effective 08/31/01 to 06/30/03 (all CBID's moved to T)
STRS members not subject to collective bargaining, moved to this code 08/31/01. Rank and File members moved to this code 01/01/02	STRS	M	<u>TC</u> Effective 08/31/01 to 06/30/03 <u>TA</u> Effective 10/01/03 to current

STRS RETIREMENT SYSTEM

Employees must be a member of STRS at the time of appointment with the State and must meet eligibility requirements as defined by STRS. Contact STRS for additional information.

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

<u>PST RETIREMENT SYSTEM</u>			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates*
<p>Employees who were in account code "N" prior to implementation of PST rolled over into code "TD"</p> <p>OR</p> <p>Used for employee hired or rehired on or after 07/31/91 who are not eligible for membership in a retirement plan and are not subject to Medicare.</p>	PST	N	<p><u>TD</u></p> <p><u>Effective 07/31/91 to current</u></p>
<p>Employees who were in account code "NM" prior to implementation of PST rolled over into code "TM"</p> <p>OR</p> <p>Used for employee hired or rehired on or after 07/31/91 who are not eligible for membership in a retirement plan that must pay into Medicare.</p>	PST	M	<p><u>TM</u></p> <p><u>Effective 07/31/91 to current</u></p>

PST RETIREMENT

Administration by DPA for employees who are not eligible for membership in the California Public Employees' Retirement System (CalPERS) and are eligible are required by law to participate in Social Security or a retirement plan on or after 07/31/91.

If an employee is not eligible for membership in any retirement system, determine if the employee is subject to or eligible for membership in the PST retirement system. An employee cannot be in a retirement system in one position and in the PST retirement system in another position at the same time.

Employees that are excluded from PST include the following:

- Employees that have multiple positions with the State and one of the positions is or becomes covered by CalPERS, LRS, STRS, JRS or Social Security.
- Employees who are members of CalPERS as a result of a concurrent position with a public agency
- Employees who are hired on a temporary basis to handle disaster emergencies such as fires, storms, earthquakes, etc.
- Employees who are hired through programs designated to relieve the from unemployment (e.g. summer youth programs)
- Patients or inmates who are paid to work in the institutions in which they are housed.
- Non-resident aliens with "F", "J" or "M" teaching visas.
- Individuals appointed to California Conservation Corps (Agency 532) with exempt contract classifications (i.e. corps member appointed to class code 6666 or 8888)
- Casual employee who are provided Health and Welfare benefits.
- Returning employees who have retired from the State or other public employment which was covered by CalPERS
- Individuals who are employed and performing services for the State as an independent contractor.
- Election officials/workers who are paid less than \$100 in a calendar year.
- Employees deferring a minimum of \$7,500 annually into a tax-sheltered annuity plan under Internal Revenue Code Section 403(b).

(Rev 05/08)

2.63.1mm |

- Student Assistants in class code 4870 who work at campuses where they attend school and students that work for the Department of Education or the following Special Schools: School for the Blind-Fremont, School for the Deaf-Fremont, School for the Deaf-Riverside, Diagnostic Center-Central, Diagnostic Center-North and Diagnostic Center-South.

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

<u>ARP RETIREMENT</u>			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates*
<p>Members who are first employed by the state on or after 08/11/04 who contribute to ARP for the first 24 calendar months of employment</p> <p>OR</p> <p>Industrial ARP members who transfer to a Miscellaneous position within the first 24 calendar months of employment</p>	ARP	O	<p><u>TK</u> Effective 08/11/04 to current</p> <p>* BU 02 moved to TE effective 07/01/06</p> <p>* BU 12 moved to TN effective 10/31/07</p> <p>*BU 18 moved to TR effective 01/01/07</p>
<p>Members who are first employed by the State on or after 08/11/04 who contribute to ARP for the first 24 months</p> <p>OR</p> <p>Miscellaneous ARP members who transfer to an industrial position within the first 24 calendar months of employment</p>	ARP	O	<p><u>TP</u> Effective 08/11/04 to current</p> <p>* BU 02 moved to TF effective 07/01/06</p>
<p>Members in BU 18 employed at Porterville Developmental Center who are first employed by the State on or after 08/11/04 who contribute to ARP for the first 24 months of employment</p> <p>OR</p> <p>Members in BU 18 employed at Southern California Facility Developmental Center and Sierra Vista Developmental Center who are first employed by the State on or after 01/01/07 who contribute to ARP for the first 24 months of employment.</p>	ARP	O	<p><u>TR</u> Effective 08/11/04 to current for employee at Porterville Developmental Center.</p> <p>Effective 01/01/07 to current for employees at Southern California Facility and Sierra Vista Facility.</p>
<p>Members who were previously in account code TK were moved to this account code on 07/01/06</p> <p>OR</p> <p>Members in BU 02 who are first employed by the State between 08/11/04 and 06/30/06 who contribute to ARP for the first 24 calendar months of employment</p>	ARP	O	<p><u>TE</u> Effective 07/01/06 for BU 02</p>

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

<u>ARP RETIREMENT</u>			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates*
Industrial or Miscellaneous ARP members who are first employed by the State between 08/11/04 and 06/30/06 transfer to a Miscellaneous position in BU 02 with in the first 24 calendar months of employment			
Members who were previously in account code TP were moved to this account code on 07/01/06 OR Members in BU 02 who are first employed by the State between 08/11/04 and 06/30/06 who contribute to ARP for the first 24 calendar months of employment OR Industrial or Miscellaneous ARP members who are first employed by the State between 08/11/04 and 06/30/06 who transfer to a Industrial position in BU 02 within the first 24 calendar months of employment	ARP	O	<u>TF</u> <u>Effective 07/01/06</u>
Members in BU 02 who are first employed by the State on or after 07/01/06 who contribute to ARP for the first 24 calendar months of employment. OR Industrial or miscellaneous ARP members who are first employed by the State on or after 07/01/06 and transfer to a miscellaneous position in BU02 within the first 24 calendar months of employment.	ARP	O	<u>TG</u> <u>Effective 07/01/06 for BU 02</u>
Members in BU 02 who are first employed by the State on or after 07/01/06 who contribute to ARP for the first 24 calendar months of employment.	ARP	O	<u>TH</u> <u>Effective 07/01/06 for BU 02</u>

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

ARP RETIREMENT			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates*
OR Industrial or miscellaneous ARP members who are first employed by the State on or after 07/01/06 and transfer to an Industrial position in BU02 within the first 24 calendar months of employment.			
Members who are first employed by the State on or after 01/01/07 in BU 1, 3, 4, 7, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20 and 21 who contribute to ARP for the first 24 calendar months of employment OR Industrial or Miscellaneous members who are first employed by the State on or after 01/01/07 and transfer to a Miscellaneous or Industrial position in BU 1, 3, 4, 7, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20 and 21 who contribute to ARP for the first 24 calendar months of employment	ARP	O	<u>TJ</u> Effective 01/01/07 to current * BU 12 moved to TZ effective 10/31/07 * BU 18 moved to TL effective 01/01/07
Members in BU 18 employed at Dept of Developmental Services, Porterville Facility, Southern California Facility or Sierra Vista Facility who are first employed by the State on or after 01/01/07 who contribute to ARP for the first 24 months of employment	ARP	O	<u>TL</u> Effective 01/01/07
Industrial members who are first employed by the State on or after 01/01/07 in BU 1, 3, 4, 7, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20 and 21 who contribute to ARP for the first 24 calendar months of employment OR Industrial or Miscellaneous members who are first employed by the State on or after 01/01/07 and transfer to a Industrial position in BU 1, 3, 4, 7, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20 and 21 within the first 24 calendar months of employment	ARP	O	<u>TS</u> Effective 01/01/07 to current

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

ARP RETIREMENT			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates*
Members in BU 12 employed at CalTrans who are first employed by the State on or after 01/01/07 who contribute to ARP for the first 24 months of employment	ARP	O	<u>Effective 10/31/07</u> TN
Members in BU 12 who were in account code TJ moved to this account code on 10/31/07	ARP	O	<u>Effective 10/31/07</u> TZ
OR			

ARP RETIREMENT

Senate Bill 1105 amended the Government Code to establish an Alternative Retirement Program (ARP) for certain new State employees. The ARP provides a retirement savings plan administered by the Department of Personnel Administration (DPA) Savings Plus Program in lieu of a retirement benefit under CalPERS.

The ARP is mandatory for State employees first hired on or after 08/11/04 and qualify for CalPERS membership in the State Miscellaneous or State Industrial category. An employee must complete a total of 1000 hours while in the PST retirement program before they can be placed in ARP. Employees are not CalPERS eligible until the 1000 hours are completed. When the employee becomes CalPERS eligible they will be placed in ARP for 24 months. After the 24 months are completed the employee must be transferred to a traditional CalPERS account code. Questions regarding eligibility requirements should be directed to CalPERS.

ARP is mandatory for a new state employee whose employment meets all of the following conditions, included in the definition of "state employee" under Government Code Section 19815 and qualifies for CalPERS membership as a State Miscellaneous or State Industrial member and first employed by the state on or after 08/11/04.

The following employees are excluded from ARP:

- Current CalPERS members who are employed or rehired after 08/11/04.
- Employee first employed by the state on or after 08/11/04 and within the prior six months was a member of a reciprocal CalPERS retirement system. Refer to the CalPERS State Handbook for a current listing of CalPERS reciprocal retirement systems.
- Non-resident aliens working under the provisions of a F-1, J-1, M-1 or Q-1 visa.
- Individuals employed by the CHP as a cadet at the department's training school.
- Employees who are members of JRS, LRS, STRS or the University of California Retirement System.
- Employees appointed as a State Safety or POFF member.

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

<u>NON-RETIREMENT</u>			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates*
<p>Employee is appointed prior to 04/01/86 and are not eligible for membership in CalPERS, JRS, LRS, STRS, ARP or PST retirement systems</p> <p>OR</p> <p>Employee is a retirement member or non-retirement member in another position and has been continuously employed since prior to 04/01/86 (overtime positions are not subject to retirement)</p> <p>OR</p> <p>Employee has a code "A" in item 545 (oath/non-citizen)</p>	NON	N	<p><u>N</u></p> <p><u>Effective 07/01/74 to current</u></p>
Casual employee appointed on or after 04/01/86 – has Health and Welfare benefits	NON	M	<p><u>NA</u></p> <p><u>Effective 04/01/86 to current</u></p>
Employee appointed on or after 04/01/86 to a Safety class not subject to retirement (would be for optional position where member is not subject to the PST plan)	NON	M	<p><u>NB</u></p> <p><u>Effective 04/01/86 to current</u></p>
Casual employee appointed prior to 04/01/86 – has Health and Welfare benefits	NON	M	<p><u>NH</u></p> <p><u>Effective 07/01/74 to current</u></p>
<p>Employee is appointed prior to 04/01/86 and are not eligible for membership in CalPERS, JRS, LRS, STRS, ARP or PST retirement systems</p> <p>OR</p> <p>Employee is a retirement member or non-retirement member in another position and has been continuously employed on or after 04/01/86 (overtime positions are not subject to retirement)</p>	NON	M	<p><u>NM</u></p> <p><u>Effective 04/01/86 to current</u></p>
<p>Exempt/Statutory employee qualified for membership – elected not to be a member</p> <p>Or</p>	NON	O	<p><u>NO</u></p> <p><u>Effective 07/01/74 to current</u></p>

ITEM 505

CALPERS RETIREMENT ACCOUNT CODES AND DESCRIPTIONS

<u>NON-RETIREMENT</u>			
Description	Type of Member	O = SS/Med M = Medicare N = Neither	Account Codes and Effective Dates*
(Cont.) Legislator elected to or serving in office on or after 11/01/90 who cannot be a retirement system member, but shall pay into Social Security (California State Constitution Article IV Section 4.5)	NON	O	<u>NO (cont.)</u>
Employee appointed prior to 04/01/86 to a Safety class not subject to Social Security (would be for optional position where member is not subject to the PST plan)	NON	N	<u>NS</u> <u>Effective 07/01/74 to current</u>

NON-RETIREMENT PLANS

These account codes are used for employees who are not subject to or do not meet eligibility requirement for or cannot belong to any retirement system or PST plan

ITEM 505 - ACCOUNT CODE (cont.)

GLOSSARY**Account Code (Retirement)**

A two digit numeric or alpha code used to designate an employee's membership or non-membership status in a retirement system, the retirement system name, and the benefit formula of the employee's retirement coverage.

Additional Position

A position in addition to employee's primary employment. Additional position(s) may be with the same or different appointing power. May be appointed to the same or different tenure, class or time base.

Alien

A foreign born resident who has not become a naturalized citizen of the country in which they are residing.

Calendar Year

The twelve month period of time beginning January 1 and ending the following December 31.

Citizen

A member of a State or Nation, by birth or naturalization, who owes allegiance to it and is entitled to full civil rights.

Fiscal Year

The twelve month period of time beginning July 1 and ending the following June 30.

Industrial

Position - designated "Industrial" by DPA. Defined in GC Section 20382.

Member - Includes all State employees who are not State Safety members, State Miscellaneous members or State Peace Officer/Fire Fighter members.

Medicare

A National health program through which certain medical and hospital expenses of the aged and the needy are paid for from Federal, mostly Social Security, funds. The hospital insurance tax portion of the Federal Insurance Contributions Act (FICA).

Member

An employee who has qualified for membership in a retirement system and on whose behalf an employer has become obligated to pay contributions.

Miscellaneous

Position - designated "Miscellaneous" by DPA. Defined in GC Section 20380.

Member - Includes all members employed by the State and State Universities except Industrial, Patrol, State Peace Officer/Fire Fighter and State Safety members.

ITEM 505 - ACCOUNT CODE (cont.)

GLOSSARY (cont.)

Non-Citizen

A foreign born resident who has not become a naturalized citizen of the country in which they are residing.

OASDI (Social Security)

Federal Old Age and Survivor's (Disability) Insurance - Social Security. A Federal system of old-age, unemployment, or disability insurance for various categories of employed and dependent persons, financed by a fund maintained jointly by employees, employers, and the government.

Oath

A declaration of support and allegiance as defined in Article XX, Section 3 of the Constitution of the State of California.

Patrol Member

Includes all members employed by the Department of California Highway Patrol whose principle duties consist of active law enforcement services.

Peace Officer/Fire Fighter (POFF)

Includes State officers and employees designated as Peace Officers as defined in Sections 830.2, 830.3, 830.4 and 830.5 of the Penal Code.

Prospective

That which is expected in the days, months, or years ahead, in the future.

PST

PST (Part-time, Seasonal and Temporary), a retirement plan for employees who are not eligible for membership in the California Public Employees' Retirement System and are required by Federal law to participate in a retirement plan or in Social Security.

Retirement Systems/DPA Plan

Systems/plans responsible for retirement contributions and benefits of participating employees. Includes the retirement systems CalPERS, JRS, STRS or LRS and the PST plan.

CalPERS

California Public Employees' Retirement System. A control agency responsible for retirement contributions and benefits; also administers the Health Benefit Program.

ITEM 505 - ACCOUNT CODE (cont.)

GLOSSARY (cont.)

CHP

A retirement system plan for California Highway Patrol employees whose principle duties consist of active law enforcement service (GC 20390).

First-Tier

A retirement system plan for civil service employees who are retirement members and pay into retirement. (May or may not pay Social Security/Medicare.) (See GC 21060.)

Industrial

A retirement system plan for civil service employees whose positions have been designated "Industrial" by DPA. (Non-Safety position - in a "Safety" agency.) (See GC 20382.)

Modified First-Tier

An optional retirement system plan for current/newly hired Civil Service Second-Tier Miscellaneous/Industrial members. Eligibility is based on bargaining unit agreement. (May or may not pay Social Security/Medicare).

POFF

A retirement system plan for civil service employees whose positions have been designated "Peace Officer/Fire Fighter" by DPA. (See GC 20390.)

Safety

A retirement system plan for employees whose positions have been designated "Safety" by DPA. (See GC 20390, 21061 and 21062.)

Second-Tier

A retirement system plan for civil service employees who are retirement system members; but do not contribute to (do not pay into) retirement. (May or may not pay Social Security/Medicare.) (GC 21074 and 20950.1.)

JRS

Judges Retirement System.

LRS

Legislators Retirement System.

ITEM 505 - ACCOUNT CODE (cont.)

GLOSSARY (cont.)

STRS

State Teacher's Retirement System.

NON

A retirement system designation for those employees not eligible for/not covered by the CalPERS, STRS, LRS, or JRS retirement systems or the PST retirement plan when:

- Employee is not eligible for CalPERS, STRS, LRS, JRS retirement membership or the PST retirement plan; or
- Appointment is an addition to position(s) subject to CalPERS, STRS, LRS, or JRS retirement membership; or
- Exempt/Statutory employee who qualifies for retirement membership elects to be a non-retirement member; or
- Employee is in a Safety class which is not subject to Social Security - may be subject to Medicare; or
- Employee is in a Casual Employee class - subject to Health and Welfare Benefits plan.

Retroactive

Going into effect as of a specified date in the past - to go back to.

R01

Retirement document generated by CalPERS to reflect an employee's retirement election or to correct an employee's retirement/employment history record on the data base. (R01 transactions can not be documented/keyed by agencies - CalPERS submits to PPSD for processing to the data base.)

RST

Retirement System Transaction - retirement document generated by CalPERS. (See R01 description above.)

Safety Member

Includes members employed by the Department of Forestry and Fire Protection whose principle duties consist of active fire suppression or supervision, officers and employees in the Department of Corrections, Youth Authority, Mental Health Hospitals (Patton and Atascadero) and all persons who perform lifeguard duties.

ITEM 505 - ACCOUNT CODE (cont.)

GLOSSARY (cont.)

State Service

Service rendered as an employee or officer (employed, appointed or elected) of the State as defined in GC 20069.

Survivors Only

Retirement designation/formula for employees who meet the criteria for membership in a retirement system but are not subject to (do not pay) Social Security or Medicare due to 1959 election or alien status. (See GC 20070, 21364, 21546(b), 21548, 21549, 21629, 21624.)

Vested

A member is "vested" when they have the minimum service credit they need to retire.

Visa

An endorsement on a passport, showing that it has been examined by the proper officials of a country and granting entry into or passage through that country.

ITEM 510 - MEMBERSHIP EFFECTIVE DATE

This item is not to be used at this time.

ITEM 515 - SAFETY MEMBER

DESCRIPTION: COMPUTER GENERATED ONLY

Indicates the employee's PERS benefit category in this position. Corrections will be accepted from PERS only.

CODES
DEFINED:

MIS = Miscellaneous Member

IND = Industrial Member

SAF = Safety Member

PAT = Patrol Member

POF = Peace Officer/Firefighter Member

NO = Non-Retirement Member

ITEM 520 - SURVIVORS BENEFITS

DESCRIPTION: This item indicates by "YES" or "NO" if employee is covered under P.E.R.S. 1959 Survivors Benefits.

REQUIRED: Although this item is normally computer generated, the appointing power must make an entry for the following conditions:

Legislative Retirement System Member

- 1 - Legislative Retirement System member (exempt employee) who is not covered by Social Security/Medicare, elects not to have Survivors Benefits coverage, and who is new or returning to State service with no history on data base.
- 2 - Current exempt employee changing membership to Legislative Retirement System and who does not have Social Security or Survivors Benefits coverage.

Judges Retirement System Member

- 3 - Judges Retirement System member (exempt employee) who should have Survivors Benefits and who is new or returning to State service with no history on data base.
- 4 - Current exempt employee changing membership to Judges Retirement System and who has Survivors Benefits coverage.

ENTER: NO - For #1 and 2 above.

YES - For #3 and 4 above.

ADDITIONAL INFORMATION: Personnel Operations will contact PERS for information on Survivors Benefits when a civil service employee returns to State service with no history on data base and Account Code 00 or 90 is entered in Item 505.

Corrections to this item will be accepted only from a retirement system and will generate a new PAR.

EXAMPLE:

SURVIVORS BENEFITS <div style="font-size: 1.5em; font-weight: bold; text-align: center;">NO</div> <div style="font-size: 0.8em; text-align: center;">520</div>
--

ITEM 525 - SS/MED MEMBER

DESCRIPTION: COMPUTER GENERATED ONLY

This item indicates whether an employee has Social Security or Medicare coverage or neither coverage for this position.
Values are as follows:

YES = Social Security coverage
MED = Medicare coverage
NO = Neither Social Security or Medicare

ITEM 530 - RETIREMENT RATE

DESCRIPTION: Indicates rate of contribution into the retirement system for this position.

REQUIRED: Although this item is normally computer generated, the appointing power must make an entry under the following conditions:

Legislative Retirement System Member

- 1 - Legislative Retirement System member (exempt employee) whose rate is 4.00 and has no Social Security/Medicare coverage and is returning to State service with no history on data base.
- 2 - Current exempt employee changing membership to Legislative Retirement System whose rate is 4.00 and has Social Security/Medicare coverage.

U. C. Retirement System Member

- 3 - U. C. Retirement System member (exempt employee) whose rate is 7.10 and who has no Social Security/Medicare coverage and is returning to State service with no history on data base.
- 4 - Current exempt employee changing membership to U. C. Retirement System whose rate is 7.10 and has no Social Security/Medicare coverage.

ENTER: The appropriate rate (up to 4 digits) as mentioned above.

ADDITIONAL INFORMATION: PERS Miscellaneous members in a Two-Tier (Second Tier) plan will generate '00.00' in this field.

Corrections to this item will be accepted only from a retirement system and will generate a new PAR.

EXAMPLE:



ITEM 535 - EXEMPT AUTHORITY

DESCRIPTION: Denotes the legal authority for the exempt appointment.

REQUIRED: 1 - For A30 - A35 Transactions except when the new information is the same as what is shown in the shaded area.

2 - For S05 Transactions: 1) Resignation to accept CSU appointment; or 2) Moving to, from or between exempt positions when lump sum vacation is paid; or 3) For current PERS member moving to exempt position under a different retirement system; or 4) Appointment or employment by Legislature (House or Legislative Committee).

ENTER:	One of the following codes:	It represents this Article of the Constitution:
	A	VII 4 (A)
	B	VII 4 (B)
	C	VII 4 (C)
	D	VII 4 (D)
	E	VII 4 (E)
	F	VII 4 (F)
	G	VII 4 (G)
	H	VII 4 (H)
	I	VII 4 (I)
	K	VII 4 (K)
	L	VII 4 (L)
	M	VII 4 (M)
	R	IX 2.1
	S	XX 22
	T	XXXV 7 /XXI 2

ADDITIONAL INFORMATION: This code will be automatically deleted by the computer on A01, A02, or A03 Transactions when employee is returning to civil service from exempt appointment.

EXAMPLE:



ITEM 540 - PERMANENT STATUS

This item is not being used at this time.
Disregard any information printed in this item.

ITEM 545 - OATH / NON-CITIZEN

DESCRIPTION: Denotes if oath has been signed, or if non-citizen, whether employee has Social Security or Medicare coverage based on type of visa.

- REQUIRED:**
- 1 - For A01, A02, A03, A22, and A32 Transactions when employee is new to State service or returning to State service; or
 - 2 - For A01 or A02 Transactions for current employee moving to civil service from exempt where no oath was signed previously; or
 - 3 - For A30, A31 and 545 Transactions.

EXAMPLE: In "Oath" box:

- X - Employee is a citizen and Form 689, Oath of Allegiance or Form 688, Oath of Office (for some exempt employees) has been signed and is on file.

* In "Non-Citizen" box:

If employee is a non-citizen, enter one of the following codes to indicate Social Security or Medicare coverage:

- A - Non-Resident Alien with F-1, J-1 or M-1 visa and services performed are to carry out the purpose for which the individual was admitted to the United States. The employee is not subject to either Social Security or Medicare deductions.

OR

Non-Resident Alien working outside the United States. The employee is not subject to either Social Security or Medicare deductions.

- B - Resident or Non-Resident Alien who does not meet the condition for Code A above. The employee is subject to Social Security or Medicare deductions.

(continued on next page)

ITEM 545 - OATH / NON-CITIZEN (continued)

**ADDITIONAL
INFORMATION: ***

Non-citizens may be employed providing it is consistent with the non-citizen's status under the Federal Immigration Law. Please refer to the Personnel Management Policy and Procedures Manual (PMPPM), Sections 370 and 371 for specific information.

EXAMPLE:

OATH	NON- CITIZEN
<input checked="" type="checkbox"/>	<input type="checkbox"/>
545	

OATH	NON- CITIZEN
<input type="checkbox"/>	<input checked="" type="checkbox"/>
545	

ITEM 550 - MEDICAL CLEARANCE

DESCRIPTION: Denotes approval date of last medical report or health questionnaire or that the proper medical clearance is on file. See Selection Manual, Section 7500.

REQUIRED: 1 - For Civil Service Appointment when employee is new to data base; OR when medical clearance information is changing.

2 - For 550 Transaction

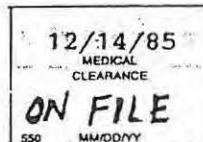
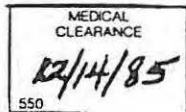
ENTER: For Medical Report - last approval date (mm/dd/yy).

For Health Questionnaire - last approval date (mm/dd/yy);

or

"ON FILE" for a current employee.

EXAMPLE:



ITEM 555 - FINGERPRINT

DESCRIPTION: Indicates the date fingerprints were taken.

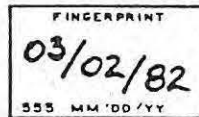
REQUIRED: 1 - For appointment transactions when required by law or departmental policy.

2 - For 555 Transactions.

LENGTH: 6 characters

ENTER: Date (mm/dd/yy) fingerprints were taken.

EXAMPLE:



ITEM 560 - PROFESSIONAL LICENSE

DESCRIPTION: Indicates the type of license, credential or certificate required to continue employment in the class and the date the license, credential or certificate expires.

REQUIRED:

- 1) For 560 Miscellaneous Change Transaction; or
- 2) For any other transaction to report, change or delete the professional license information when allowable on the Required/ Conditional Chart.

ENTER: In "Type" box:

One of the following codes (1 digit):

- 1 - Driver's License
- 2 - Consumer Affairs License (e.g., Medical, Engineer, Nurse, Architect, Psychiatric Technician)
- 3 - Teaching Credential
- 4 - Other
- * - deleting type of license.

In "Expiration Date" box:

Date (mm/dd/yy) of expiration; or

Leave blank if no expiration date; or

*EOF - deleting expiration date.

ADDITIONAL INFORMATION:

For more than one license, use Line 8/9, Item 884 - License Additional.

EXAMPLE:

PROFESSIONAL LICENSE	
TYPE	EXPIRATION DATE
1	06/03/84
560	

PROFESSIONAL LICENSE	
TYPE	EXPIRATION DATE
1	11/15/85
560	MM/DD/YY

NOTE: All applicable information must be completed whenever an entry is made.

ITEM 565 - JOB INCURRED INJURY

DESCRIPTION: Identifies periods of disability and type of compensation resulting from an employee's job-incurred injury or illness.

REQUIRED: For 565 Miscellaneous Change Transaction. Refer to PAM Section 5 - Documentation of WCTD/IDL, before documenting a job incurred injury or illness.

ENTER: The applicable Code (1 digit) and Dates (mm/dd/yy) according to instructions in PAM Section 5.

In "CODE" box:

- 1 - On WCTD - (Do not take off payroll, to be used only for employees back to work full time but are losing time for subsequent Dr. appointment).
- 2 - On WCTD - (Take off payroll).
- 3 - Off WCTD - (Was on payroll working full time but losing subsequent time for Dr. appointment.)
- 4 - Off WCTD - (Was off payroll at time of return to work.)
- 5 - On IDL - (Take off payroll.)
- 6 - Off IDL - (Return to payroll.)

In "INJURY DATE" box:

Date (mm/dd/yy) of injury; or

*EOF - to delete date for codes 3, 4 or 6.

In "WCTD/IDL DATE" box:

Date (mm/dd/yy) employee is approved for IDL or receives compensation under SCIF; or

*EOF - to delete date for codes 3, 4 or 6.

ITEM 565 - JOB INCURRED INJURY

ADDITIONAL
INFORMATION:

This item does not print in Item 565 on the turnaround
PAR; however, it is stored on the data base.

EXAMPLE:

NOTE: All applicable information must be completed
whenever an entry is made.

JOB INCURRED INJURY	
CODE	INJURY DATE
2	03/29/84
	WCTD/IDL DATE
565	04/02/84
	MM/DD/YY

JOB INCURRED INJURY	
CODE	INJURY DATE
4	*EOF
	WCTD/IDL DATE
565	*EOF
	MM/DD/YY

ITEM 603 - REASON FOR SEPARATION

DESCRIPTION: This item is used to denote the reason for employee's separation. The code used also determines which separation statement will print on the NOPA.

REQUIRED: For S01, S04, S50, S55, and S80 Transactions for civil service employees only.

This item is optional for exempt employees.

Note: A NOPA will not be issued for California Conservation exempt employees.

The appropriate two digit code from the following:

For S01 - RESIGNATION W/O FAULT - VOLUNTARY

- 01 - Other employment
- 02 - Job dissatisfaction
- 03 - Pregnancy leave not requested (NOPA prints: "NOT LISTED - ON FILE IN DEPARTMENT")
- 04 - Remain at home
- 05 - Further education
- 06 - Illness
- 07 - Family illness or obligations
- 08 - Transportation problems
- 09 - Moving to another area
- 10 - Personal reasons
- 13 - Not listed - On file in department
- 14 - Non-school period
- 15 - Accepting another State job after a break in service of 11 working days
- 16 - Failed to comply with leave conditions
- 17 - Failed to submit military orders within 15 working days
- 23 - Vista or Peace Corps
- 27 - Intermittent employee in non-work status for over 1 year. NOPA prints: "YOU HAVE NOT WORKED FOR OVER 1 YEAR. THIS RESULTS IN AN AUTOMATIC RESIGNATION WITHOUT FAULT PURSUANT TO SPB RULE 448."
- 28 - Intermittent employee waived 3 requests to report to work. NOPA prints: "YOU HAVE WAIVED THREE REQUESTS FROM YOUR DEPARTMENT TO REPORT TO WORK. THIS RESULTS IN AN AUTOMATIC RESIGNATION."

For S04 - RESIGNATION W/O FAULT - FAILURE TO MEET
CONDITIONS OF EMPLOYMENT

- 18 - Failed to meet conditions of employment.

(continued on next Page)

2.77 (Rev. 11/05)

For S50 - LEAVE OF ABSENCE - REGULAR

- ENTER: 05 - Education
06 - Illness
07 - Family illness or obligations
10 - Other acceptable reasons
11 - Parental Leave
26 - Lessen impact of layoff per SPB Rule 6.2 and 361 - This certifies that a layoff situation exists, preliminary seniority information has been requested from SPB and this leave will have the effect of lessening the impact of the layoff. (NOTE: If Code 26 and another code apply, use Code 26.) Also see Item 215 information, PAM page 2.36.
32 - Adoption
33 - Union Activity
34 - Federal Family and Medical Leave Act (FMLA) or California Family Rights Act (CFRA)
35 - State Disability Insurance Leave-employee eligibility for FMLA or CFRA benefits
36 - State Disability Insurance Leave-employee NOT eligible for FMLA or CFRA benefits

For S55 - LEAVE OF ABSENCE - SPECIAL

- 20 - U. S. Merchant Marine Service
21 - Full time Red Cross Employment
22 - Military Substitute Service
23 - Peace Corps or Vista Service
29 - Veteran's Education
30 - Technical Cooperation Program (per G.C. 19991.2)

For S80 - TERMINATION - ILLEGAL APPOINTMENT

- 25 - Illegal Appointment under G.C. 19257.5
31 - Illegal Appointment under G.C. 19257

ADDITIONAL INFORMATION:

In 04/79, codes 27 and 28 replaced code 24, which read: Permanent intermittent employee was requested three times to report and did not report; or permanent intermittent in non-pay status for over one year, not broken by a temporary separation. (NOPA printed: "FAILED TO REPORT FOR INTERMITTENT WORK.")

EXAMPLE:

REASON FOR SEPARA- TION 05
--

603

2.78 (Revised 10/84)

ITEM 605 - PAY PERIOD

DESCRIPTION: Identifies multiple pay periods corresponding to the time shown in Item 606 - Time to be Paid (New).

REQUIRED: For A01, A02, A30 -A35 Immediate Pay Appointments when requesting pay for up to a maximum of three pay periods.

ENTER: The month and year (mm/yy) that corresponds to the time shown in Item 606 - Time to be Paid (New).

ADDITIONAL INFORMATION: If no entry is made, it is assumed the pay is requested for the pay period shown in Item 210 - Effective Date and Hours.

EXAMPLE:

PAY PERIOD	PAY PERIOD
<u>05/84</u>	<u>07/84</u>
<u>06/84</u>	<u>08/84</u>
<u>07/84</u>	
605 MM/YY	605 MM/YY

2.79 (Revised 11/09)

ITEM 606 - TIME TO BE PAID (NEW)

DESCRIPTION: This item shows regular time to be paid for the current position number, salary and/or timebase for the pay period of action. (If Semi-Monthly, pay period of action is either the first or second half.)

REQUIRED: NEGATIVE AND POSITIVE ATTENDANCE EMPLOYEES **

- 1 - All Immediate Pay Appointments.
- 2 - All Separation Transactions. **EXCEPTION:** Do not complete this item for a S49 Transaction if employee is paid by positive attendance (Roll Codes 3 - 8). **
- 3 - 715 Transaction (Roll Codes 1, 2 and 8).

NEGATIVE ATTENDANCE EMPLOYEES ONLY **

- 4 - All transactions when the effective date (Item 210) reflects a part of the day; that is, it contains hours, BOB (beginning of business) or COB (close of business).
- 5 - All transactions when pay is more or less than normal for the pay period due to docks or Alternate/Irregular work shifts.
- 6 - All transactions when Item 607 - Time to be Paid (Old), is completed per item requirements.
- 7 - 565 Transaction - job codes 2, 4, 5, 6 - Refer to Section 5 Documentation of Workers' Compensation (TD/IDL).
- 8 - Any A02, A03, A12, A30 - A33 Transactions returning the employee from any temporary separation.
- 9 - 340 and 341 Transactions.
- 10 - All Appointment Transactions returning the employee from Adverse Suspension (S85).

(continued on next page)

ITEM 606 - TIME TO BE PAID (NEW) (CONTINUED)

ENTER:

The time to be paid as indicated below:

To ensure accurate processing of data, complete this item as follows:

"DAS" - express as two digits
 "HOURS" - express as three digits (or NON)
 "HDTH" - express as two digits

If time to be paid is none, enter 'NON' in the "Hours" column and do not make an entry in "DAS" or "HDTH".

If Salary Per ** (Item 310) Is:	(Per PPM 10.36) Express In:
M - Month	Day, hours, tenths
D - Day	Days, hours, hdths
H - Hour	Hours, hdths
U - Unit	Number of units (enter in "Hours" column)
O - Other	Number of units (enter in "Hours" column)
***Multiple Hourly Rate	Place alpha letter in "DAS" column and time to be paid in "Hours" column. This identifies the rate at which time is to be paid.

**ENTRIES
DEFINED:**

If employee has odd days off, refer to PTM Section 657
BEFORE completing this item.

Match "Required" conditions from page 2.79 with numeric
entries below.

For #1 - Immediate Pay Appointments - Complete with
regular time to be paid for a maximum of three pay periods.
The time must correspond with the pay periods shown in Item
605.

For #2 - Separation Transactions - Complete with regular
time to be paid up through the effective date of action only. Do
not include any time worked after the effective date of action
(i.e., reinstatement later in the same pay period).

For #3, 4, 5 or 6 - Transactions - Complete with regular
time to be paid from the current position number and/or
timebase for the pay period of action.

2.79.2 (Revised 11/09)
ITEM 606 - TIME TO BE PAID (NEW) (CONTINUED)

**ENTRIES
DEFINED:
(cont.)**

For #7 - 565 Transactions - Refer to Section 5 - Documentation
of Worker's Compensation (TD/IDL) pages 5.38 -
5.38.1

For #8 - Reinstatement Transactions from any temporary
separation:

SAME pay period as temporary separation - Complete
with total regular time* to be paid for the pay
period of the effective date. (Not to include
intervening timed worked.)

DIFFERENT pay period than temporary separation -
Complete with regular time* to be paid from the
effective date of reinstatement through the end of
the pay period. (Not to include any intervening
time worked.)

For #9 - 340 Transaction - Complete as follows:

10 month employee who did not elect 10/12 option -
Completed with time in pay status up to the
effective date of action.

10/12 month employee who is not entitled to a full 12
months of payment due to numerous docks or a
late start - Complete with "NON" in the "Hours"
column.

For #9 - 341 Transaction - Complete with total time in pay
status
for the pay period of the effective date.

**For #10 - Reinstatement Transactions from Adverse
Suspension** effective in:

SAME pay period as S85 - Complete with total time in
pay status for the pay period of the effective date.

DIFFERENT pay period on S85 - Complete with time in
pay status from effective date of reinstatement
through the end of the pay period.

ITEM 606 - TIME TO BE PAID (NEW) (CONTINUED)

ADDITIONAL
INFORMATION:

Information entered in this item will turnaround on the PAR in Line 10 - Remarks for separation transactions only.

* Regular time is considered time worked and/or credits used prior to and/or after reinstatement from a leave status.

** See Payroll Procedures Manual, Section D, for information on positive and negative attendance reporting.

*** Use rates and alpha letters from Line 8/9, Item 955 - Multiple Hourly Rate.

EXAMPLE:

TIME TO BE PAID (NEW)		
12	001	70
606 DAS	HOURS	MDTH

TIME TO BE PAID (NEW)		
606 DAS	HOURS	MDTH

TIME TO BE PAID (NEW)		
00	081	25
606 DAS	HOURS	MDTH

ITEM 607 - TIME TO BE PAID (OLD)

DESCRIPTION: This item shows regular time to be paid from the prior position number, salary or timebase when employee occupied more than one position number, salary and/or timebase in the same pay period of action. (If Semi-Monthly, pay period of action is either the first or second half.)

REQUIRED: Only when PAR meets the above conditions for:

NEGATIVE AND POSITIVE ATTENDANCE EMPLOYEES **

- 1 - All Separation Transactions (When immediate payment is being requested from the previous position number, refer to Line 8/9, Item 958.)
- 2 - Appointment to an Agricultural Association (Agency 014, Reporting Unit 000) from any other department.

NEGATIVE ATTENDANCE EMPLOYEES ONLY **

- 3 - All transactions when the effective date (Item 210) reflects a part of the day; that is, it contains hours, BOB (beginning of business) or COB (close of business).
- 4 - All transactions when pay is more or less than normal for the pay period due to docks or Alternate/Irregular work shifts.

ENTER: The time to be paid as indicated below:

To ensure accurate processing of data, complete this item as follows:

- "DAS" - express as two digits
- "HOURS" - express as three digits (or NON)
- "HDTH" - express as two digits

If time to be paid is none, enter 'NON' in the "Hours" column and do not make an entry in "DAS" or "HDTH".

ITEM 607 - TIME TO BE PAID (OLD) (CONTINUED)

ENTER:
(Cont.)

If Salary Per ** (Per PPM Section D)
(Item 310) Is: Express In:

M - Month.....Days, hours, tenths

D - Day.....Days, hours, hdths

H - Hour.....Hours, hdths

U - Unit.....Number of units (enter in "Hours" column)

O - Other.....Number of units (enter in "Hours" column)

*** Multiple

Hourly Rate.....Place alpha letter in "Das" column and
time to be paid in "Hours" column. This
identifies the rate at which time is to
be paid.

ENTRIES
DEFINED:

For "Required" conditions #1, 2, 3, or 4 - Complete with
regular time to be paid from employee's prior
position number and/or salary and/or timebase
for the same pay period of action.

If the employee was in 3 or more position numbers and/or
salaries and/or time bases for the same pay period, enter
only the time worked in the last position up to but not
including the effective date of the most recent position,
salary or time base.

ADDITIONAL
INFORMATION:

Information entered in this item will turnaround on
the PAR in Line 10 - Remarks, for separation transactions
only.

** See Payroll Procedures Manual, Section D, for
information on positive and negative attendance
reporting.

*** Use rates and alpha letters from Line 8/9,
Item 955 - Multiple Hourly Rate.

EXAMPLES:

TIME TO BE PAID (OLD)		
05	001	50
607 DAS	HOURS	HDTH

TIME TO BE PAID (OLD)		
NON		
807 DAS	HOURS	HDTH

TIME TO BE PAID (OLD)		
00	012	25
607 DAS	HOURS	HDTH

2.81 (Rev. 05/08)

ITEM 615 - PAY IMMEDIATELY

DESCRIPTION: This item is used to request immediate payment of regular pay (Item 606) for the month of separation or for Pay Appointments.

REQUIRED:

- 1 - For A01, A02, A30 - A35 Immediate Pay Appointments
- 2 - For S01-S41, S50-S56, S70-S80, S90-S95 Transactions when immediate pay is desired. DO NOT COMPLETE THIS ITEM IF SEPARATION PAYMENT HAS ALREADY BEEN REQUESTED OR PAID.

DO NOT COMPLETE THIS ITEM when separation is for:

- Printing Rate classes at the State Printing Plant
- Casual Employment Trade Rate Classes
- Variable Pay Schedule Classes

Instead, submit proper documentation to Payroll Services, requesting any regular payment for month of separation (including overtime payment for California Conservation Corps).

Separation PAR must be submitted at the SAME time as or BEFORE the payroll document is submitted.

LENGTH: 1 character

ENTER: "X" for immediate payment.

ADDITIONAL INFORMATION: Item 615 is not completed when requesting payment only for lump sum vacation, sick leave or extra hours (Items 620 or 625).

Information entered in this item will turnaround in Line 10 - Remarks.

EXAMPLE:



PAR ITEMS LINES 1 THROUGH 7**ITEM 620 LUMP SUM TO BE PAID**

DESCRIPTION: Identifies the amount of time being requested as lump sum payment of vacation/annual leave/personal leave and/or sick leave.

REQUIRED: On a separation transaction when:

- 1 - Requesting Lump Sum Vacation/Annual Leave/Personal Leave Payment; OR
- 2 - Requesting Lump Sum Sick Leave Payment only when employee is entitled to permanent disability compensation per G.C. 19991.4 on S32, S56 or S71 transactions

VACATION:

Enter lump sum due an employee based on the effective date of separation.

NOTE: DO NOT enter "NON" in Lump Sum fields if no pay is being requested. Leave Blank.

To ensure accurate processing of data, complete vacation portion of this item as follows:

- "DAS" - express as two digits
 "HOURS" - express as three digits
 "HDTH" - express as two digits

NOTE: If the total lump sum vacation time to be paid is greater than 99 days, enter 99 in the lump sum days field and convert the remaining days beyond 99 into hours. Add the hours to any other lump sum vacation hours to be paid and enter in the lump sum hours field.

If employee has over 99 days 999 hours (vacation, annual leave, PLP) – Item 620 should reflect 99 DAYS 999 HOURS – and Item 215 must reflect total vacation, annual leave and PLP time. **EXAMPLE:** LSV=345D7H (345 days 7 hours).

The PAR must be submitted to PPSD to be manually keyed. Additional time **SHOULD NOT** be reflected in Item 625. Item 625 is for CTO, holiday credit, and/or excess hours only.

EXAMPLES:

<u>Time Base</u>	<u>Vacation/ Annual Leave Hours</u>	<u>Example</u>															
<u>FULL TIME</u> - Express in days, hours, and tenths/hundredths of an hour.	36 1/4 hours =	<table><tr><th colspan="3">LUMP SUM TO BE PAID</th></tr><tr><td>(SL)</td><td></td><td></td></tr><tr><td>04</td><td>004</td><td>25</td></tr><tr><td>(V)</td><td></td><td></td></tr><tr><td>DAS</td><td>HOURS</td><td>HDTHS</td></tr></table>	LUMP SUM TO BE PAID			(SL)			04	004	25	(V)			DAS	HOURS	HDTHS
LUMP SUM TO BE PAID																	
(SL)																	
04	004	25															
(V)																	
DAS	HOURS	HDTHS															

2.82.1 (Rev. 05/05)

PAR ITEMS LINES 1 THROUGH 7

ITEM 620 LUMP SUM TO BE PAID

Time Base	Vacation/ Annual Leave Hours	Example
-----------	---------------------------------	---------

FULL TIME - Express in days, hours, and tenths/hundredths of an hour.

1004 hours =

LUMP SUM TO BE PAID		
(S)		
99	212	00
(V)		
620 HOURS	HOURS	HDTHS

PART TIME - Express in days, hours, and tenths/hundredths of an hour.

If fraction is 1/2 then 38 2/3 hours =

LUMP SUM TO BE PAID		
(S)		
09	002	70
(V)		
620 HOURS	HOURS	HDTHS

PART TIME - Express in days, hours, and tenths/hundredths of an hour.

If fraction is 1/2 then 522 hours =

LUMP SUM TO BE PAID		
(S)		
99	126	00
(V)		
620 HOURS	HOURS	HDTHS

HOURLY -HOURLY - Do not convert to days.days. Express in hours and tenths/hundredths of an hour.

136 2/3 hours =

LUMP SUM TO BE PAID		
(S)		
00	136	70
(V)		
620 HOURS	HOURS	HDTHS

SICK LEAVE:

Enter lump sum due only if employee is entitled to permanent disability compensation (per G.C. 19991.4).

NOTE: DO NOT enter "NON" in Lump Sum fields if no pay is being requested. Leave Blank.

To ensure accurate processing of data, complete sick leave portion of this item as follows:

- "DAS" - express as three digits
- "HOURS" - express as four digits
- "HDTH" - leave blank

PAR ITEMS LINES 1 THROUGH 7**ITEM 620 LUMP SUM TO BE PAID****ENTER:** EXAMPLE:

Express in days and hours.

45 hours =

LUMP SUM TO BE PAID			
S/L	005	0005	
(VAC)			
620	DAS	HOURS	HDTH

ADDITIONAL INFORMATION: To prevent an overpayment, the following transactions must be sent to PPSD for special handling:

Voids of any separation and reposting with a different effective date and Lump Sum Hours (item 620) and/or Lump Sum Extra Hours (item 625) was entered on the original separation.

When an employee's separation includes lump sum to be paid and "Item 350" (Special Pay) and/or "Item 351" (Established Earnings) reflects a premium pay that is not eligible for inclusion in lump sum, refer to "Item 962" (Separation Pay At Alternate Salary Rate).

Refer to PAM Section 5.75, Lump Sum Vacation Payment for documentation instructions to defer Lump Sum pay to the next tax year.

CONVERSION CHART (Tenths of Hours)	
Mins.	Tenths
0-6	.1
7-12	.2
13-18	.3
19-24	.4
25-30	.5
31-36	.6
37-42	.7
43-48	.8
49-54	.9
55-60	1.0

2.82.3 (Rev/ 09/03)

PAR ITEMS LINES 1 THROUGH 7

TEM 620 LUMP SUM TO BE PAID

CONVERSION CHART (HUNDREDTHS OF HOURS)			
MINUTES	HUNDREDTHS	MINUTES	HUNDREDTHS
01	.02	31	.52
02	.03	32	.53
03	.05	33	.55
04	.07	34	.57
05	.08	35	.58
06	.10	36	.60
07	.12	37	.62
08	.13	38	.63
09	.15	39	.65
10	.17	40	.67
11	.18	41	.68
12	.20	42	.70
13	.22	43	.72
14	.23	44	.73
15	.25	45	.75
16	.27	46	.77
17	.28	47	.78
18	.30	48	.80
19	.32	49	.82
20	.33	50	.83
21	.35	51	.85
22	.37	52	.87
23	.38	53	.88
24	.40	54	.90
25	.42	55	.92
26	.43	56	.93
27	.45	57	.95
28	.47	58	.97
29	.48	59	.98
30	.50	60	1.00 hr.

PAR ITEMS LINES 1 THROUGH 7

2.83

ITEM 625 - LUMP SUM EXTRA HOURS

(Rev. 09/03)

DESCRIPTION: Identifies the amount of time being requested as lump sum payment for CTO, holiday credit, personal holiday, Saturday holiday and/or excess hours.

REQUIRED: For separation transactions when requesting lump sum pay for CTO, holiday credit, personal holiday, Saturday holiday and/or excess hours.

ENTER: The amount of lump sum extra hours due employee.

NOTE: DO NOT enter "NON" in Lump Sum fields if no pay is being requested. Leave Blank.

To ensure accurate processing of data, complete this item as follows:

"DAS" - express as two digits
 "HOURS" - express as three digits
 "HDTH" - express as two digits

NOTE: If the total lump sum extra time to be paid is greater than 99 days, enter 99 in the lump sum days field and convert the remaining days beyond 99 into hours. Add the hours to any other lump sum extra hours to be paid and enter in the lump sum extra hours field.

ADDITIONAL INFORMATION:

To prevent an overpayment, the following transactions must be sent to PPSD for special handling:

Voids of any separation and reposting with a different effective date and Lump Sum Hours (item 620) and/or Lump Sum Extra Hours (item 625) was entered on the original separation.

When an employee's separation includes lump sum to be paid and 'Item 350' (Special Pay) and/or 'Item 351' (Established Earnings) reflects a premium pay that is not eligible for inclusion in lump sum, refer to 'Item 962 - Separation Pay At Alternate Salary Rate'.

Refer to PAM Section 5.76, Lump Sum Payment Deferral for documentation instructions to defer Lump Sum pay to the next tax year.

EXAMPLE:

Time Base

Vacation/

Annual Leave Hours

Example:

FULL TIME - Express in days, hours, and tenths/hundredths of an hour.

36 ½ hours =

LUMP SUM EXTRA HOURS			LUMP SUM PAYMENT CODE
04	004	50	
625 DAS	HOURS	HDTH	

PAR ITEMS LINES 1 THROUGH 7

2.83.1

ITEM 625 - LUMP SUM EXTRA HOURS

Time Base

FULL TIME - Express in days, hours, and tenths/hundredths of an hour.

Vacation/

Annual Leave Hours

1004 hours =

Example:

LUMP SUM EXTRA HOURS			LUMP SUM PAYMENT CODE
99	212	00	
625 DAS	HOURS	HDTH	

PART TIME - Express in days, hours, and tenths/hundredths of an hour.

If fraction is 1/2
then 38 1/2 hours =

LUMP SUM EXTRA HOURS			LUMP SUM PAYMENT CODE
09	002	50	
625 DAS	HOURS	HDTH	

PART TIME - Express in days, hours, and tenths/hundredths of an hour.

If fraction is 1/2
then 522 hours =

LUMP SUM EXTRA HOURS			LUMP SUM PAYMENT CODE
99	126	00	
625 DAS	HOURS	HDTH	

HOURLY - Do not convert to days. Express in hours and tenths/hundredths of an hour.

136 3/4 hours =

LUMP SUM EXTRA HOURS			LUMP SUM PAYMENT CODE
00	136	75	
625 DAS	HOURS	HDTH	

ITEM 630 - LUMP SUM PAYMENT CODE

(Rev. 09/03)

DESCRIPTION: This item identifies the type of payment to be made when lump sum is to be paid from a unit and/or serial number other than the regular position number shown in Item 121 and/or 123.

REQUIRED: When lump sum is to be paid from unit and/or serial number shown in Items 635/636.

LENGTH: 1 character

ENTER: The appropriate code:

1. Vacation/Annual Leave/Personnel Leave
2. Personal Holiday/Saturday Holiday/Extra Hours
3. Vacation/Annual Leave/Personal Leave/Personal Holiday/
Saturday Holiday and Extra Hours
4. Sick Leave
5. Vacation/Annual Leave/Personal Leave and Sick Leave
6. Personal Holiday/Saturday Holiday/Extra Hours and Sick Leave
7. Vacation/Annual Leave/Personal Leave/Personal Holiday/Saturday
Holiday/Extra Hours and Sick Leave

ADDITIONAL INFORMATION:

Refer to PAM Section 5.76, Lump Sum Payment Deferral for documentation instructions to defer lump Sum pay to the next tax year.

Example:

LUMP SUM PAYMENT CODE 5 630
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PAR ITEMS LINES 1 THROUGH 7

2.85

ITEM 635/636 - LUMP SUM UNIT/SERIAL

(Rev. 03/02)

DESCRIPTION: This item identifies the unit and/or serial number from which lump sum is to be paid when different than the regular position number shown in Item 121 and/or 123.

REQUIRED: For the following transactions when lump sum is to be paid from a different unit and/or serial number than shown in Item 121 and/or 123:

- Separation Transactions S01 – S41, S52, S56, S70 – S80-, S90 and S95.

LENGTH: Up to 6 characters

ENTER: Item 635

The unit number (3 characters) for which lump sum payment is to be made, and/or

Item 636

The serial number (3 characters) for which lump sum payment is to be made.

EXAMPLE:

LUMP SUM	
UNIT	SERIAL
015	001
635	636

ITEM 645 – SEPARATION EXPIRATION DATE AND HOURS

DESCRIPTION: Indicates the last day employee may be on a temporary separation.

REQUIRED: For S50 – S85 Transactions.

“Hours” is required when Item 210 show hours and separation is for maximum time allowable (see example).

ENTER: “Date” – (mm/dd/yy) of expiration.

“Hours” – When REQUIRED, enter the same number of hours as shown in Item 210 (un-shaded area). “COB” or “BOB” are not accepted in “Hours” column, therefore, the expiration date will be understood “COB” unless hours are shown.

ADDITIONAL

INFORMATION: For S50, S54, S56, S57 or S85 Transactions, the effective date of reinstatement must be no later than the day following the date in Item 645. The dates of reinstatement and employee’s first scheduled work day may differ if the reinstatement date falls on employee’s regularly scheduled day off (i.e., Saturday, Sunday, or Holiday).

NOTE: For S50 transaction and Reason for Separation, Item 603, is 35 or 36 enter the anticipated return date if known. If not known, enter the date that is 1 year from the S50 transaction Effective Date, Item 210. If a new effective date, S50 transaction is processed to change Reason for Separation Code 35 or 36 or visa versa, the Separation Expiration Date must not be more than 1 year from the original S50 Effective Date.

EXAMPLE:

SEPARATION EXPIRATION	
Date	Hours
04/20/06	
645 mm/dd/yy	

EXAMPLE 1: Maximum time allowable is one year and Item 210 shows 04/20/05. Employee’s reinstatement must be no later than 04/21/06.

SEPARATION EXPIRATION	
Date	Hours
04/19/06	
645 mm/dd/yy	

EXAMPLE 2: Maximum time allowable is one year and Item 210 shows 04/20/05 BOB. Employee’s reinstatement must be no later than 04/20/06.

2.87 (Rev. 11/86)
ITEM 655 – FIXED MAINTENANCE

DESCRIPTION: The fixed maintenance amount to be deducted each pay period for rent, room and board, etc.

REQUIRED: When fixed maintenance is to be deducted from employee's pay. This item may only be completed when processing an appointment or separation.

ENTER: First/Final Deduction

Appointment – Enter one-time deduction amount if less than full monthly amount due. In addition, Monthly Deduction column must be completed.

Separations – Enter one-time deduction amount if less than full monthly amount due. Do not complete Monthly Deduction column.

Monthly Deductions

Appointment – Enter the full monthly amount.

ADDITIONAL

INFORMATION: Changes in fixed maintenance deductions must be reported on Form 650 per Controller's Payroll Procedure Manual, Section H 650

EXAMPLE:

FIXED MAINTENANCE FIRST/FINAL DED 23.50 MONTHLY DED 75
655

ITEM 705 - TOTAL STATE SERVICE

DESCRIPTION: Indicates employee's total State service used to credit vacation allowances and service awards.

REQUIRED: This item is required for a 705 Transaction. It may be completed for any other transaction if shown as conditional on the Required/Conditional Chart.

ENTER: "MOS." - Total number months of State service.

"HOURS" - Total number hours and tenths of hours of State service. Entry must be less than 160 hours. **NOTE:** Use this area for intermittent or indeterminate time base employees ONLY. Enter 5 numeric zeros to delete hours shown in the shaded area.

"AS OF" - MM/DD/YY - 6 digit date through which total State service is computed, not to exceed the date on which the transaction is entered on the data base.

**ADDITIONAL
INFORMATION:**

The most recent entry made in this item is the only entry stored on the data base. Personnel Operations does not record previous entries. Therefore, only the shaded area information on the latest Turnaround PAR can be corrected. See PAM Section 9 for instructions.

This item is not audited for proper crediting of total State service.

EXAMPLE:

FROM: [shaded]			
TOTAL STATE SERVICE			
	MOS.	HOURS	AS OF
TO:	1	80.5	11/30/88
	705		MM/DD/YY

FROM: 53 - 124.8 - 11/30/88			
TOTAL STATE SERVICE			
	MOS.	HOURS	AS OF
TO:	54	00000	12/07/88
	705		MM/DD/YY

ITEM 710 - INTERMITTENT DATES AND HOURS

DESCRIPTION: Indicates state service hour credits for employees who had or have an intermittent or indeterminate time base.

REQUIRED: Hours worked by a Civil Service or Exempt (providing exempt time can be credited for state service). Employee who has or had an intermittent/indeterminate time base, must be reported if one or more of the conditions indicated below exists. Do not include hours which have already been reported on a previous transaction. **EXCEPTION:** This information is not required for a Retired Annuitant appointed under G.C. 19144 subject to G.C. 21224. See PTM Section 704 for additional information.

- 1 - Appointment to a different class.
- 2 - A03 returning employee from NDI Leave (S49) and employee worked while on NDI.
- 3 - 325 transaction when a new HAM (hiring above minimum) is authorized or changed and new anniversary date must be established.
- 4 - 335 transaction for employee in a deep class or when salary rule indicates a new anniversary date must be established.
- 5 - 710, MSA or SIS Transactions.
- 6 - S01 through S95 Transactions.
- 7 - Transactions requiring seniority information.
- 8 - Appointing power change. (Completed at the Department's discretion on an A13 Transaction.)
- 9 - For transactions involving a time base change from intermittent to full time, part time or indeterminate. (Complete for change from indeterminate time base only if Line 8/9, Item 891 - Indeterminate Service Accumulation, showed "HOURS".)
- 10 - For additional position(s) when a condition above exists and the total of the employee's time bases are full time or less.

ENTER: Dates, hours and tenths of hours of state service not previously reported up to the effective date of the transaction being reported. (Enter oldest dates and hours on first line. **Partial beginning and/or ending pay periods must be reported as separate line entries.**

(continued on next page)

ITEM 710 - INTERMITTENT DATES AND HOURS

ENTER:
(Cont.)

If there are no hours of state service to be reported*, enter dates and 000 for hours. For an appointment with an intermittent time base, the effective date of the initial appointment is always the day on which the employee enters upon the duties and the beginning date entered in Item 710, Line 1 must agree with that effective date when intermittent dates and hours for that appointment are being reported. (See PTM Section 201, Item 10 [d].)

ADDITIONAL
INFORMATION:

- When reporting intermittent dates and hours for either partial and/or complete pay periods, enter only those hours the employee was paid between the beginning and ending dates shown in Item 710 not to exceed a maximum of 160 hours per pay period. **Do not include** any hours (i.e.: "**carry-over hours**") which were reported on a previous transaction. (When carry-over hours reported on a previous transaction are added to and included in with hours being reported in Item 710, the employee receives double credit/benefit for them as they are being reported twice.)
- For MSA and SIS Transactions: Carry-over hours (if any) must be entered in Item 215 - Employment History Remarks unless employee is going to MAX. Do not enter carry-over hours in Item 215 if employee is going to MAX. See Item 215 - PAM page 2.37 1.
- The system will not accept an entry of more than 9,999.9 hours per line in Item 710. See "Additional Information" (example #3) when reporting hours in excess of 9,999.9 hours per line in Item 710. Tenths of an hour must be expressed as a single digit. See Appendix III.
- Daily rate classes must show hours in Item 710. Multiply the actual number of days worked (regardless of number of hours worked per day) by 8 to determine the number of hours to be entered in Item 710 - entry can not exceed maximum of 160 hours credit per pay period. The Line 10 Item - "On File for Audit" must be checked on the transaction and the computation must be on file with the department. (See computation example below.)

If Item 710 shows:

Computation may show:

Intermittent Dates, Hours and Tenths

Actual Days Actual Hours¹

1) 04/15/99 thru 04/30/99 = 80 HRS

10

50

(Continued on next page)

2.89.2 (Rev. 08/00)

ITEM 710 - INTERMITTENT DATES AND HOURS (Cont.)

EXAMPLE:

#1.)

Appointed full-time	07/09/98	(No hours to be reported)	
Time-base change to intermittent	09/23/98	(No hours to be reported)	
Appointed to different class as intermittent	11/05/98	**09/23/98 - 9/30/98	10/01/98 46.5 hours
		- 10/31/98	**11/01/98 - 153.8 hours
		11/04/98	32 hours
Time-base change to full-time	05/25/99	**11/05/98 - 2/01/98	144.2 hours
		12/02/98 - 04/30/99	789.7 hours
		**05/01/99 - 05/24/99	117.3 hours

#2a.)

Appointed (intermittent employee) SISA	05/22/98	(No hours to be reported)	45.2 hours
			925.3 hours
	12/02/98	**05/22/98 - 5/31/98	(carry-over = 10.5 Hours)
		06/01/98 - 12/01/98	

2b.)

Carry-over hours (already reported in employment history) are counted toward an MSA by adding them to, **not into**, the hours reported in Item 710. (See example below.)

Appointment (intermittent employee) SISA	05/04/98	(No hours to be reported)	45.2 hours
			925.3 hours
	12/02/98	05/04/98 - 05/31/98	925.3 hrs (+) 45.2 =
		06/01/98 - 12/01/98	970.5 hours
			970.5 hrs (-) 960
			= 10.5 carry-over hours

ITEM 710 - INTERMITTENT DATES AND HOURS (cont.)

Example (cont.)

970.5 (Total hours actually worked from 05/04/98 through 12/01/98) minus 960 (960=# of hours required for SISA) leaves a carry-over (C/O) of 10.5 hours which is to be posted in PAR Item 215 (PAM 2.37.1) and counted toward MSA.

MSA 02/01/00 12/02/98 - 01/31/00 1913.5 hours

1913.5 hours (+) 10.5 = 1924 hours

1924.0 hours (-) 1920 = 4 C/O hours

1,913.5 (total hours actually worked from 12/02/98 through 01/31/00) and the 10.5 C/O hours from the 12/02/98 SISA are added together and equal 1924 hours. 1920 (# of hours required for a MSA) is subtracted from the 1924 hours leaving a C/O of 4 hours which is to be posted in PAR Item 215 (PAM 2.37.1) and counted toward next MSA.

#3.)

The system will not all an entry reporting intermittent hours for multiple complete consecutive pay periods (which would normally be reported on one line in Item 710) when the hours exceed 9999.9. When this situation occurs, the hours and corresponding pay periods must be divided and reported as two or more line entries in Item 710. See example below:

Intermittent employee received MSA to MAX 05/01/92

Employee appointed to another class. 04/16/99

Hours for "from" class must be reported on new appointment (in Item 710) covering time from 05/01/92 through 03/31/99 - 10,151.9 hours and from 04/01/99 through 04/15/99 - 73.5 hours.

ITEM 710

Incorrect documentation:

line 1) 05/01/92 thru 03/31/99 10,151.9 hours

line 2) 04/01/99 thru 04/15/99 73.5 hours

- * Since the system does not allow more than 9,999.9 hours on a line, the 10,151.9 hours (and corresponding pay periods) must be divided and reported on more than one line as shown below:

Correct documentation:

line 1) 05/01/92 thru 04/30/96 5,867.7 hours

line 2) 05/01/96 thru 03/31/99 4,284.2 hours

line 3) 04/01/99 thru 04/15/99 73.5 hours

**** IMPORTANT REMINDER:**

PARTIAL beginning and/or ending pay periods must be reported as separate line entries.

2.90 (Revised 05/10)

ITEM 715 - SERVICE PAY PERIOD

DESCRIPTION: Identifies a qualifying or non-qualifying pay period of State Service per DPA Regulation 599.608.

- REQUIRED:**
- 1 - When the effective date of a transaction DOES NOT reflect a qualifying or non-qualifying pay period.
 - 2 - When reporting a 715 Transaction:
 - to make a pay period non-qualifying *1; or
 - to qualify a pay period while on NDI Leave (Employee returns to work for 11 days or more during the pay period, and Line 12 - Employment History, shows less than 11 days on work status.); or
 - to qualify a pay period while on SDI leave; or
 - to qualify a pay period or CCC employee on Federally Funded WCTD.
 - to qualify a pay period while the employee is on furlough and dock (Employee's dock time minus furlough time would create a qualifying pay period.)
 - 3 - When the effective date of a transaction DOES reflect a non-qualifying pay period and the agency is participating in the California Leave Accounting System (CLAS):
 - For temporary separations (S49, S50, S51, S52, S53, S54, S55, S56, S57, S85); or
 - for all appointment transactions returning an employee from a temporary separation (S49, S50, S51, S52, S53, S54, S55, S56, S57, S85)

ENTER: Month/Year (mm/yy) next to:

"N" for non-qualifying pay period; or
"Q" for qualifying pay period

**ADDITIONAL
INFORMATION**

- : *1 When reporting a non-qualifying pay period resulting from a temporary or permanent separation for more than 11 consecutive working days which fall between two consecutive pay periods (this includes semi-monthly employees), an entry is required in Item 215 - Employment History Remarks (see PAM page 2.37.1).

EXAMPLE:

SERVICE PAY PERIOD Q 02/85 715 MM/YY

ITEM 720 - SPECIAL PLUS

- DESCRIPTION:
1. For transactions effective before 7/27/79 or after 10/30/84:

THIS ITEM IS NOT USED.
 2. For transactions effective 7/27/79 through 10/30/84:

This term is computer generated only and applies to Civil Service, DPA exempt and Judicial Council employees. It does not apply to employees in non-career classes (Payscale Footnote 22). Information shown in this item reflects the Special GSI plus salary for lower paid employees as described in DPA Pay Scales (Schedule C). The Special Plus will normally change whenever Item 320, (Based on Salary) changes and will be included in the total salary shown in Item 306 on the turnaround PAR.

Line 12 - Employment History, will print the Special Plus in the Plus Salary column. An 'S' will appear to the right of the salary to indicate the Special Plus. If the employee also has a regular plus salary, the two pluses will be added together, and the total plus salary with an 'S' will be printed.

ITEM 725 - REEMPLOYMENT LIST CLASS

DESCRIPTION: This item denotes the last class in which reemployment eligibility was granted.

- REQUIRED: 1 - When reemployment list eligibility is granted and reporting:
- transfer, demotion or separation of civil service employee; or
 - A30 - A35 Transactions for civil service employee;
- OR
- 2 - When any of the above actions were documented prior to the effective date of layoff. (In this case, submit a corrected transaction - when the layoff goes into effect.)

ENTER: Class code (4 digits) of permanent class employee is leaving.

ADDITIONAL INFORMATION: If employee has reemployment eligibility in more than one class, send a Form DPA-016 to DPA for all classes in addition to completing this item.

If civil service employee is moving to exempt appointment and reemployment list eligibility was granted, complete this item, and in addition send a Form DPA-016 to DPA.

EXAMPLE:

REEMPLOYMENT LIST CLASS 5157 725

2.93 (New 02/86)

ITEM 728 - LOG NUMBER

This item is not to be used at this item.

0526T4

ITEM 730 - REEMPLOYMENT LIST ELIGIBILITY

- DESCRIPTION:** This item represents the type of reemployment list eligibility the employee has been granted. This becomes a part of the history record on Line 12 along with the class and effective date of reemployment list eligibility.
- REQUIRED:**
- 1 - When reemployment list eligibility is granted and reporting:
 - transfer, demotion or separation of civil service employee; or
 - A30 - A35 Transactions for current employee;

OR
 - 2 - When any of the above actions were documented prior to the effective date of layoff. (In this case, submit a corrected transaction - when the layoff goes into effect.)

ENTER: The appropriate code (up to 3 characters) below that applies to permanent class employee is leaving:

SDG - Subdivisional, departmental and general
 SG - Subdivisional and general
 SD - Subdivisional and departmental
 S - Subdivisional
 DG - Departmental and general
 D - Departmental
 G - General

ADDITIONAL INFORMATION:

If employee has reemployment eligibility in more than one class send a Form DPA-016 to DPA for all classes in addition to completing this item.

If civil service employee is moving to exempt appointment and reemployment list eligibility was granted, complete this item, and in addition send a Form DPA-016 to DPA.

EXAMPLE:



2.95 (Rev. 02/86)

ITEM 735 - REEMPLOYMENT SENIORITY SCORE

This item is not to be used at this time.

ITEM 740 - CONDITIONS OF EMPLOYMENT

This item is not to be used at this time.